Estate Questionnaire – 2026

Please ensure this questionnaire is completed, signed, and included with your records

Client Name		Phone:	
Balance Date	31 March 2026	E-mail:	

To: Harts Chartered Accountants
I instruct you to prepare the Estate's taxation return for the 2026 year. I undertake to supply all information necessary for you to perform this work and will be responsible for the accuracy and completeness of such information. You are authorised to communicate with the Estate's bankers, solicitors, finance companies and all Government agencies to obtain such information as you require in order to complete the above assignment. I also authorise you to act as the Estate's agent in dealing with all taxation matters with Inland Revenue.

Signature _____ Date _____

If sending this back by email, please type your name in above – otherwise sign it. By doing so, you are acknowledging that you accept the above terms and conditions of the engagement.

Inland Revenue prefers to pay any refunds by direct credit. Please advise the bank account you would like any refunds for the Estate deposited in to:

Account number: _____

Account name : _____

Records and Information Required:	✓	**Comments:**
1. Executors		
Please advise any changes in address and other circumstances	☐	
2. New Zealand Investments		
Copies of certificates for interest and dividends	☐	
3. Overseas Investments		
There are rules for the taxing of overseas investment including various methods of calculating foreign investment income (FIF).		
Please provide:		
Copies of certificates for interest and dividends.	☐	
A list of all overseas investments - include the cost, currency and date of purchase of those investments including foreign superannuation and life insurance schemes and property	☐	
Dividend statements of any dividends received or shares issues in lieu of dividends	☐	
There may be further information required once we have assessed what method of calculating your foreign investment income will apply.		
4. Rental Income or Mixed Use Holiday Home		
If applicable, please complete the separate questionnaires for each property in New Zealand	☐	
5. Other Income		
Please provide details of any other income	☐	