

Individual Questionnaire – 31 March 2017

Please use this questionnaire as a reference document to ensure we have all the information required with your records for all the individuals mentioned on your business questionnaire.

Records Required	<input checked="" type="checkbox"/>	Comments																									
Wages/National Superannuation/Benefits																											
Please provide us with the names of any organisations you have received the following from: <ul style="list-style-type: none"> ▪ Wages ▪ ACC payments ▪ National Superannuation ▪ Any other benefits In most cases IRD will have sent us these details direct, however we do need to check all details have been included.	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>																										
Student Loan																											
Do you have a student loan? If so, please provide your latest statement from IRD	<input type="checkbox"/>																										
Interest and Dividends																											
Please supply the advice slips. <ul style="list-style-type: none"> ▪ For interest received, you should have an annual advice notice showing the withholding tax deducted. This may be on the bottom of your bank statement dated 31 March ▪ If any dividends are taken as bonus shares, also include these advice slips 	<input type="checkbox"/> <input type="checkbox"/>																										
Rental and Leased Property																											
Please complete attached rental questionnaire	<input type="checkbox"/>																										
Home Office Expenses																											
If part of your home is set aside principally for use as an office/workshop/storage area, please provide the following details:																											
<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 70%;">Power</td> <td style="width: 30%;">\$ _____</td> </tr> <tr> <td>Insurance (Building & Contents)</td> <td>\$ _____</td> </tr> <tr> <td>Interest (House Mortgage)</td> <td>\$ _____</td> </tr> <tr> <td>Rates</td> <td>\$ _____</td> </tr> <tr> <td>Repairs & Maintenance</td> <td>\$ _____</td> </tr> <tr> <td>Other</td> <td>\$ _____</td> </tr> <tr> <td>Total</td> <td>\$ _____</td> </tr> </table>	Power	\$ _____	Insurance (Building & Contents)	\$ _____	Interest (House Mortgage)	\$ _____	Rates	\$ _____	Repairs & Maintenance	\$ _____	Other	\$ _____	Total	\$ _____	<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%;">Cost of House and Section</td> <td style="width: 50%;">\$ _____</td> </tr> <tr> <td>Cost of Section</td> <td>\$ _____</td> </tr> <tr> <td colspan="2">Construction materials: (timber, brick, etc):</td> </tr> <tr> <td colspan="2">_____</td> </tr> <tr> <td colspan="2">Area used for Business: _____ m²</td> </tr> <tr> <td colspan="2">Total Area of House & Workshop: _____ m²</td> </tr> </table>	Cost of House and Section	\$ _____	Cost of Section	\$ _____	Construction materials: (timber, brick, etc):		_____		Area used for Business: _____ m ²		Total Area of House & Workshop: _____ m ²	
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Area used for Business: _____ m ²																											
Total Area of House & Workshop: _____ m ²																											
Partnerships, Trusts, Estates and Companies																											
Please supply details of income received.	<input type="checkbox"/>																										
Overseas																											
Include overseas interest, dividends, wages received and taxation paid. Note: New Zealand residents are liable for tax on all world-wide income. If Yes, please provide details of the value and quantity of the investments held at any time during the financial year. Please provide the date, value and details of any purchases, sales and income (dividends). Please attach all of your investments advisor's reports. This information is required so we can calculate if any income needs to be declared under the FIF (Foreign Investment Fund) rules.	<input type="checkbox"/>																										

