

Individual Questionnaire – 31 March 2019

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 main questionnaire, where we complete an income tax return for those individuals.

Records Required	✓	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"/>	
Partnerships, Trusts, Estates and Companies		
Please supply details of income earned from any entity for which we do not prepare the accounts and tax returns.	<input type="checkbox"/>	
Overseas		
<ul style="list-style-type: none"> ▪ Supply details of overseas interest, dividends, wages received and taxation paid ▪ Provide details of any overseas investments held at any time during the financial year ▪ Attach all of your investments advisor's reports ▪ Have you at any point in your lifetime, ever contributed to a foreign superannuation scheme, even if you cannot receive the benefits until you retire? 	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	
Any Other Income		
Attach details: <ul style="list-style-type: none"> ▪ Income Replacement Insurance Policy – provide details of premiums and claims ▪ Look Through Company – if you have been allocated a share of a loss other than from a company that we are aware of, please provide details 	<input type="checkbox"/> <input type="checkbox"/>	
Donations		
Do you want us to complete your rebate claim form? Yes <input type="checkbox"/> No <input type="checkbox"/> If so, please attach receipts.	<input type="checkbox"/>	

Records Required	✓	Comments																												
Working for Families Tax Credits and Parental Tax Credit																														
<p>Please supply full names and birth dates of all children. Please note the following:</p> <ul style="list-style-type: none"> ▪ If you had a child born within the current financial year you may be eligible for the Parental Tax Credit. Please include their IRD Number below. If you do not have this you will need to obtain one for them in order to claim any entitlement for them ▪ Where a child has become financially independent during the current financial year, please advise the date they left school or home 	<input type="checkbox"/>																													
<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left; width: 45%;"><u>Child's Name</u></th> <th style="text-align: left; width: 15%;"><u>IRD No.</u></th> <th style="text-align: left; width: 15%;"><u>Date of Birth</u></th> <th style="text-align: left; width: 25%;"><u>Date left School</u></th> </tr> </thead> <tbody> <tr><td>_____</td><td>_____</td><td>_____</td><td>_____</td></tr> <tr><td>_____</td><td>_____</td><td>_____</td><td>_____</td></tr> <tr><td>_____</td><td>_____</td><td>_____</td><td>_____</td></tr> <tr><td>_____</td><td>_____</td><td>_____</td><td>_____</td></tr> <tr><td>_____</td><td>_____</td><td>_____</td><td>_____</td></tr> <tr><td>_____</td><td>_____</td><td>_____</td><td>_____</td></tr> </tbody> </table>	<u>Child's Name</u>	<u>IRD No.</u>	<u>Date of Birth</u>	<u>Date left School</u>	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____		
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Working for Families Tax Credits and Parental Tax Credit <i>(continued)</i>																														
<ul style="list-style-type: none"> ▪ If you have received Working for Families Tax Credits during the year, please supply the certificate issued to you by IRD, detailing the amounts. ▪ Also provide details of any child support or maintenance payments made or received. ▪ If we do not prepare your spouse or partner's taxation return, please provide us with details of their income. ▪ Have there been any changes to your family circumstances, including a change in responsibility for your dependent child(ren), you have married, separated or otherwise changed your family circumstances? If so, please provide details. ▪ Do you share custody of your child(ren) with anyone other than your partner? If so, please provide details. ▪ Did you work on average less than 20 hours per week if single or did you and your spouse / partner combined work less than 30 hours per week? If so, please provide details. 	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>																													
Additional income information - Working for Families Tax Credits																														
<p>From the year starting 1 April 2011 the definition of family income for Working for Families Tax Credits has been extended. You are now required to supply details of income received from the following sources:</p> <ul style="list-style-type: none"> ▪ Attributable trustee income Attributable trustee income is all income for the year of a trust that hasn't been distributed as beneficiary income. Trustee income will be attributed only to settlors of a trust. The settlors are individuals who establish or contribute funds to the trust. ▪ Attributable fringe benefits If you receive fringe benefits and you or your associates (e.g. the family trust) are shareholder-employees of the company you work for and you or your associates hold voting interests of 50% or more then you need to include the fringe benefits in your family income. The value of the fringe benefit is the tax-inclusive value of the benefit. ▪ PIE income This includes an amount of income attributed by a portfolio investment entity (PIE) to the principal caregiver or their spouse or partner, except if the PIE is a superannuation fund or a retirement savings scheme (e.g. KiwiSaver). ▪ Passive income of children This includes all passive income such as interest, rents or beneficiary income, received by a dependent child above a threshold of \$500 per year, per child. 	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>																													

Records Required	<input checked="" type="checkbox"/>
Mixed Use Holiday Home	
Do you have a property (such as a holiday home or a bach) that is used privately and also to derive income? If yes, provide details of property: _____ Yes <input type="checkbox"/> No <input type="checkbox"/>	<input type="checkbox"/>
Was the property empty for 62 days in the income year? Yes <input type="checkbox"/> No <input type="checkbox"/> If yes, please complete the following section so we can determine the amount of allowable deductions.	
<u>Mixed Use Holiday Home – Information Required</u>	
The number of days the property was empty during the income year _____ The number of days the asset was used by family or associated persons* during the income year OR where income from any person received was less than 80% of market rate _____ * Associated persons include close relatives, or if owned by an entity, persons associated with the entity owning the property If there is more than one tenant who used the property through the year, please attach details.	
Name of tenant: _____ Relationship to owner (if any): _____ Amount of rent they paid: \$ _____ Dates rented (From: To) _____ Expenses incurred in respect of the property (the list below is not exhaustive – details of all expenses will be required):	
Cost of advertising for tenants \$ _____ Cost of repairing damages caused by tenants \$ _____ Number of days spent in the property while repairing damages caused by tenants _____ Mortgage interest \$ _____ Rates \$ _____ Insurance \$ _____ Repairs/maintenance for general wear and tear \$ _____ Other (please give details) : _____	<input type="checkbox"/>
Mixed Use Boat or Plane	
Do you have a boat or plane (with a market value of >\$50,000), that is used privately and also to derive income? If yes, provide details: _____ Yes <input type="checkbox"/> No <input type="checkbox"/>	<input type="checkbox"/>
Description: _____ Market value: \$ _____ Was the asset unused for 62 days in the income year? Yes <input type="checkbox"/> No <input type="checkbox"/> If yes, please complete the following section so we can determine the amount of allowable deductions.	
<u>Mixed Use Boat or Plane – Information Required</u>	
The number of days the asset was unused during the income year _____ The number of days the asset was used by family or associated persons* during the income year OR where income from any person received was less than 80% of market rate _____ * Associated persons include close relatives, or if owned by an entity, persons associated with the entity owning the property For non-associated persons where payment received is at least 80% of market value:	
Number of days the asset was used: _____ Income received: \$ _____ Expenses incurred in respect of the property (the list below is not exhaustive – details of all expenses will be required):	
Cost of advertising for hireage \$ _____ Cost of repairing damages caused by hireage \$ _____ Operating costs / supplies \$ _____ Insurance \$ _____ Repairs/maintenance for general wear and tear \$ _____ Other (please give details) : _____	<input type="checkbox"/>

**Thank you for completing this questionnaire
Don't forget to sign it**