

Ensure this questionnaire is completed and included with your records

Balance Date / / 2023

Name

Please print name

.....

Records Required	✓	Comments
➤ Please provide us with the names of any organisations you have received the following from: ▪ 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.		
➤ Do you have a Student Loan?	<input type="checkbox"/>	
➤ Please supply advice slips for all interest and dividends received. For interest received, you should have an annual advice notice showing the withholding tax deducted.	<input type="checkbox"/>	
➤ Please forward details of income and expenses for any rental properties		
➤ Please supply details of any share of income from a partnership, trust, estate, company (where accounts not prepared by us). ➤ Are you a trustee of a foreign trust?	<input type="checkbox"/> <input type="checkbox"/>	
➤ Please supply details of all overseas income including, overseas interest, dividends, wages received and taxation paid. Note: New Zealand residents are liable for tax on all world-wide income. ➤ Do you hold any overseas life policies/superannuation? If Yes, please provide details of any amounts received during the year.	<input type="checkbox"/>	
➤ Do you have more than \$50,000 (cost price) invested in shares in companies, other than those listed on the NZ and Australian stock exchanges. If YES, we require cost of the investment and market value at start and end of year.	<input type="checkbox"/>	
➤ Income Replacement Insurance Policy – provide details of premiums paid.	<input type="checkbox"/>	
Donations		
➤ Do you pay any donations?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
➤ If YES, have you sent your rebate claim form to Inland Revenue?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
➤ If NO, do you want us to complete your rebate claim form?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Working for Families Tax Credits and Parental Tax Credit		
➤ Please supply full names and birth dates of all children (see below).	<input type="checkbox"/>	
➤ If you had a child born within the current financial year you may be eligible for the Parental Tax Credit. Please include a copy of the child's birth certificate or their IRD No.	<input type="checkbox"/>	
➤ Where a child has become financially independent during the current financial year, please advise the date they left school or home.	<input type="checkbox"/>	
➤ If you are eligible for the WFF tax credit we will forward a separate questionnaire to confirm your income.	<input type="checkbox"/>	
Child's Name	IRD No.	Date of Birth Date left School
_____	_____	_____
_____	_____	_____

In case you are due a tax refund, please advise details of which bank account you wish any refund, to be direct credited.

Bank Account No.
