

Ensure this questionnaire is completed and included with your records

Balance Date / / 2025

Name

Please print name

Records Required	✓	Comments
<p>➤ Please provide us with the names of any organisations you have received the following from:</p> <p>▪ Wages ▪ ACC Payments ▪ National Superannuation ▪ Any other benefits</p> <p>In most cases IRD will have sent us these details direct, however we do need to check all details have been included.</p>		
<p>➤ Do you have a Student Loan?</p>	<input type="checkbox"/>	
<p>➤ Please supply advice slips for all interest and dividends received.</p> <p>For interest received, you should have an annual advice notice showing the withholding tax deducted.</p>	<input type="checkbox"/>	
<p>➤ Please forward details of income and expenses for any rental properties</p>		
<p>➤ Please supply details of any share of income from a partnership, trust, estate, company (where accounts not prepared by us).</p>	<input type="checkbox"/>	
<p>➤ Are you a trustee of a foreign trust? If so, please supply details.</p>	<input type="checkbox"/>	
<p>➤ Please supply details of all overseas income including, overseas interest, dividends, wages received and taxation paid.</p> <p>Note: New Zealand residents are liable for tax on all world-wide income.</p>	<input type="checkbox"/>	
<p>➤ Do you hold any overseas life policies/superannuation? If Yes, please provide details of any amounts received during the year.</p>		
<p>➤ 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.</p> <p>If YES, we require cost of the investment and market value at start and end of year.</p>	<input type="checkbox"/>	
<p>➤ Income Replacement Insurance Policy – provide details of premiums paid.</p>	<input type="checkbox"/>	
Donations		
<p>➤ Do you pay any donations?</p>	Yes <input type="checkbox"/>	No <input type="checkbox"/>
<p>➤ If YES, have you sent your rebate claim form to Inland Revenue?</p>	Yes <input type="checkbox"/>	No <input type="checkbox"/>
<p>➤ If NO, do you want us to complete your rebate claim form?</p>	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Working for Families Tax Credits and Parental Tax Credit		
<p>➤ Please supply full names and birth dates of all children (see below).</p>	<input type="checkbox"/>	
<p>➤ 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.</p>	<input type="checkbox"/>	
<p>➤ Where a child has become financially independent during the current financial year, please advise the date they left school or home.</p>	<input type="checkbox"/>	
<p>➤ If you are eligible for the WFF tax credit we will forward a separate questionnaire to confirm your income.</p>	<input type="checkbox"/>	
Child's Name	IRD No.	Date of Birth

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.