

Individual Annual Questionnaire - 2023

Client name: _____ Phone _____

Would you prefer your accounts be sent to you: By e-mail By post I'll collect

I authorise you to prepare my tax return from the information and records I have supplied to you. I accept responsibility for the accuracy and completeness of all records and information supplied to you. You are authorised to communicate with my bankers, solicitors, finance companies, and any other business that Ideal with to obtain such information as you require in order to complete the above duties.

Signature.....Date.....

Information required to complete your tax return:

1. **Salary, Wages and National Superannuation**

Yes	No
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Did you receive salary, wages or national super? (If so, IRD will supply us with the details)

 2. **Interest, Dividends & PIEs**

Yes	No
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Did you receive any interest & dividends during the year?
(If so, please supply details of all interest and dividends received by enclosing dividend and Interest advice slips, Portfolio Investment Entity (PIE) income etc.)

 3. **Overseas Income**

Yes	No
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Did you receive any income from overseas such as pensions, dividends and FIFs?
(If so, please provide full details including type of income).

 4. **Rent Received**

Yes	No
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If you received rental income, please complete the rental questionnaire included or download one from our website: www.theaccountingroom.co.nz

 5. **Other Income**

Yes	No
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Did you receive any other income such as estate or trust income, commissions etc? (If so, please provide details).

 6. **Deductible Expenses**

Yes	No
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Did you have any deductible expenses such as premiums paid on income protection insurance, including **schedular's expenses**? (If so, please provide details).

 7. **Donation Rebates**

Yes	No
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Do you have any rebates to claim (School, Church or Charitable donations)?
If so, please supply the receipts and details of the bank account you would like the rebate paid into.
- Bank Account number: _____ Account Name: _____

8. Crypto assets e.g. bitcoin

Have you received or traded in crypto assets during the income year?

Yes	No
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If yes, please provide:

- The type of crypto asset
- For each transaction provide the date, type of transaction i.e. received or disposed of, number of units, value in NZD
- Total units of each crypto asset held at the beginning and end of the year
- Exchange records and bank statements
- Wallet addresses

9. FAMILY DETAILS

Some client’s children (who may now be adults) may have been linked to our tax agency in previous years, when filing returns was optional.

If so, we need to know if you wish us to continue to prepare their income tax returns, which may incur additional costs. If you do not, we will delink them from our agency, and they can file their own return for the 2023 year.

10. Only complete the section below if you have children under 19 - Working For Families

If you would like us to prepare your Working for Families Tax Credit calculation, then please provide the following information.

Eligibility for this credit varies depending on your family income and the number and age of your children.

If you had a child born within the current financial year you may be eligible for the Best Start or Parental Tax Credit. Please include their IRD number.	Yes	No		
Where a child has become financially independent during the current financial year, please advise the date they left school or home .	Yes	No		
If any child support or maintenance payments were made or received during the year, please provide details	Yes	No		
Have you received other payments from any person or entities that are used for day-to-day living expenses (e.g. \$100 a week to pay the mortgage)? If the total amount is over \$5,000 a year , please provide the details.	Yes	No		
Did any of your children receive passive income above a threshold of \$500 ? 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.	Yes	No		
Income of non-resident spouse or partner Also provide details of any worldwide income if your spouse or partner who isn't a tax resident in New Zealand is earning an income overseas.	Yes	No		
Children's details:				
If we have prepared WFFTC for you before we only need their names and details of any changes . If this is the first year we are calculating this please provide all details.				
Child's Name	IRD no	Date of Birth	If shared custody, how many days per fortnight?	Date left school

**Thank you for completing this questionnaire.
Please don't forget to sign the other side.**