

Individual Tax Return Questionnaire – 2015

Please ensure this questionnaire is completed, signed and included with your records

Client Name		Phone:	Work: Mobile: Home:
Balance Date	31 March 2015	Fax:	
		E-mail:	

To: Harts Chartered Accountants

I instruct you to prepare my taxation return for the 2015 year. I undertake to supply all information necessary for you to perform this work, and will be responsible for the accuracy and completeness of such information. You are authorised to communicate with my bankers, solicitors, finance companies and all government agencies to obtain such information as you require in order to complete the above assignment. I also authorise you to act as my agent in dealing with all taxation matters with Inland Revenue.

Signature _____ Date _____

Inland Revenue prefers to pay any refunds by direct credit. Would you please advise the bank account number you would like any refunds deposited in to:

Account number: _____

Records and Information Required	✓	Comments
1. Wages / National Superannuation / Benefits YES / NO		
Please provide us with the names of any organisations you have received the following from: <ul style="list-style-type: none"> ▪ Wages ▪ Withholding payments ▪ ACC payments ▪ National Superannuation ▪ Any other benefits In most cases Inland Revenue 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"/> <input type="checkbox"/>	
2. New Zealand Interest and Dividends YES / NO		
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. ▪ Dividend advices, including those taken as bonus shares. ▪ PIE advices or end of year summary ▪ Power company dividends 	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	
3. Overseas Income and Investments YES / NO		
<p>Note: New Zealand residents are liable for tax on all worldwide income.</p> Please complete the separate overseas income questionnaire and include: <ul style="list-style-type: none"> ▪ overseas interest, dividends, wages received, overseas pensions and taxation paid. ▪ dividends statements of any dividends received or shares issues in lieu of dividends. To comply with rules for the taxing of overseas investment including various methods of calculating your Foreign Investment Income (FIF), please provide: <ul style="list-style-type: none"> ▪ A list all your overseas investments- include the cost, currency and date of purchase of those investments including foreign superannuation and life insurance schemes. ▪ If the <u>total</u> cost of all your overseas investments <u>exceeds NZ \$50,000</u> please provide the <u>market</u> value of your investments at the beginning and end of your income year. There may be further information required once we have assessed what method of calculating your foreign investment income will apply.	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	

Records and Information Required	✓	Comments
4. Rental Income / Mixed Use Holiday Home YES / NO		
If applicable, please complete the separate questionnaires for each property.	<input type="checkbox"/>	
5. Partnerships, Trusts, Estates and Companies YES / NO		
Please supply details of income received if not prepared by Harts.	<input type="checkbox"/>	
6. Any Other Income / Deductions		
<ul style="list-style-type: none"> ▪ Attach details of any other income <input type="checkbox"/> ▪ Income Replacement Insurance Policy – provide details of premiums and claims. <input type="checkbox"/> ▪ Look Through Company (LTC) – 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"/> ▪ Expenses incurred against withholding payments <input type="checkbox"/> ▪ Invoices for self-employed ACC premiums paid <input type="checkbox"/> - Were you working for more than 20 hours per week? YES / NO 		
7. Student Loans		
I have a student loan	<input type="checkbox"/>	
8. Donations		
Do you want us to complete your rebate claim form? YES / NO If so, please attach receipts		
8. During the year the following transactions took place:		
<ul style="list-style-type: none"> ▪ Forgiveness of debt <input type="checkbox"/> ▪ Property transactions <input type="checkbox"/> ▪ I received proceeds from the sale of land/buildings (other than private dwelling) <input type="checkbox"/> <p>Please attach details</p>		
10. Home Office Expenses - relating to business / self-employed / shareholder employees Please note that this information only needs to be provided in one of your questionnaires		
If part of your home is set aside principally for use as an office/workshop/storage area, please provide the following details:		
Address of property: _____		
Power	\$ _____	
Insurance (Building & Contents)	\$ _____	
Interest (House Mortgage)	\$ _____	Business Area _____ M2
Rates	\$ _____	
Repairs & Maintenance	\$ _____	Total Area _____ M2
Rent paid	\$ _____	
Other	\$ _____	
Total	\$ _____	