Individual Tax Return Questionnaire – 2018

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

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| --- | --- | --- | --- |
| Client Name |  | Phone: |  |
| Balance Date | 31 March 2018 | Fax: |  |
| E-mail:  |  |

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Signature Date \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

If sending this back by email, please type your name in above – otherwise sign it. By doing so, you are acknowledging that

you accept the above terms and conditions of the engagement.

*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: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*

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| --- | --- | --- |
| 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:* 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. | [ ] [ ] [ ] [ ] [ ]  |  |
| 2. New Zealand Interest and Dividends YES / NO |
| Please supply the advice slips.* 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 (Entrust)
* Have you had any shares released by employee share schemes

e.g. Air NZ or Fisher & Paykel Healthcare employee share scheme.Please provide certificate/s | [ ] [ ] [ ] [ ] [ ]  |  |
| 3. Overseas Income and Investments YES / NO |
| **Note:** New Zealand residents are liable for tax on all worldwide income.Please complete the separate overseas income questionnaire and include:* overseas interest, wages received, overseas pensions and taxation paid.
* dividend 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:* 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 total cost of all your overseas investments exceeds NZ $50,000 please provide the market 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.  | [ ] [ ] [ ] [ ]  |  |

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| Records and Information Required | ✓ | Comments |
| 4. Rental Income / Mixed Use Holiday Home YES / NO |
|  If rent received exceeds $4,000 please complete the separate questionnaires for each property.  | [ ]  |  |
| 5. Did you have any income from short term rentals, i.e. Airbnb YES / NO |
|  If yes, please supply details  | [ ]  |  |
| 6. Have you bought or sold any property this year? YES / NO |
|  If yes, please supply details  | [ ]  |  |
| 7. Partnerships, Trusts, Estates and Companies YES / NO |
|  Please supply details of income received if not prepared by Harts. | [ ]  |  |
| 8. Any Other Income / Deductions |
| * Attach details of any other income, i.e. royalties, share options
* Income Replacement Insurance Policy – provide details of premiums and claims.
* 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
* Expenses incurred against withholding payments
* Invoices for self-employed ACC premiums paid

- Were you working for more than 20 hours per week? **YES / NO** | [ ] [ ] [ ] [ ] [ ]  |  |
| **9. Student Loans** |  |  |
| I have a student loan |[ ]   |
| **10. Donations** |  |  |
| Do you want us to complete your rebate claim form? **YES / NO**If so, please attach receipts (include donations to school) |  |  |
| **11. During the year the following transactions took place:** |  |  |
| * Forgiveness of debt
* Property transactions
* I received proceeds from the sale of land/buildings

 (other than private dwelling)Please attach details | [ ] [ ] [ ]  |  |
| 12. Working For Families Tax Credits / Parental Tax CreditIf you or your partner had dependent children as at 1 April 2017 please complete the separate Working for Families Tax Credits and Parental Tax Credit questionnaire |

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| 13. 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) $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Rates $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Repairs & Maintenance $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Rent paid $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Other $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**Total $**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | Business Area \_\_\_\_\_\_\_\_\_\_\_ M2Total Area \_\_\_\_\_\_\_\_ M2  |