Individual Tax Return Questionnaire - 2022

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

Client Name		Phone:					
Balance Date	31 March 2022	E-mail:					
To: Harts Chartered Accountants I instruct you to prepare my taxation return for the 2022 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 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 In	formation Required	√	Comments				
Has the nature of your business changed in any way during the past 12 months? If yes, please provide brief details. 1. Wages / National Superannuation / Benefits YES / NO							
Please provide us of following from: Wages Withholding paym ACC payments National Superan Any other benefits In most cases Inlan	with the names of any organisations you have received the nents						
2. New Zealand I	nterest and Dividends YES / NO						
withholding tax de dated 31 March.	ved, you should have an annual advice notice showing the educted. This may be on the bottom of your bank statement						
PIE advices or enPower company ofHave you had any	lividends (Entrust) shares released by employee share schemes her & Paykel Healthcare employee share scheme.						

Records and Information Required	✓	Comments					
3. COVID-19 Wage Subsidy and Resurgence Support Payments							
Did you receive a COVID-19 wage subsidy If so, how much \$ Was this banked into your business account Yes □ No □							
Did you receive a Resurgence Support Payment Yes □ No □ If so, how much \$ Was this banked into your business account Yes □ No □							
4. 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 issued 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 of 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. 							
5. Rental Income / Mixed Use Holiday Home YES / NO							
If rent received exceeds \$4,000 please complete the separate questionnaires for each property.							
6. Did you have any income from short term rentals, i.e. Airbnb YES / NO							
If yes, please supply details							
7. Have you bought or sold any property this year? YES / NO							
If yes, please supply details							
8. Partnerships, Trusts, Estates and Companies YES / NO							
Please supply details of income received if not prepared by Harts.							
9. 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							

10. Student Loans				
I have a student loan				
11. Donations				
Do you want us to complete your rebate claim form? If so, please attach receipts (include donations to school)	YES / NO			

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 Credit							
If you or your partner had dependent children as at 1 April 2021 please complete the separate Working for Families Tax Credits and Parental Tax Credit questionnaire							
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	\$	Business AreaM2		M2			
Repairs & Maintenance	\$						
Rent paid	\$	Total Area M2			_ M2		
Other	\$						
Total	\$						