

Individual Tax Return Questionnaire – 2024

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

Client Name		Phone:	
Balance Date	31 March 2024	E-mail:	

To: Harts Chartered Accountants

I instruct you to prepare my taxation return for the 2024 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 _____

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: _____

Records and Information 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 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 (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 	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	

9. Any Other Income / Deductions			
<ul style="list-style-type: none"> ▪ 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 	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>		
10. Student Loans			
I have a student loan	<input type="checkbox"/>		
11. Donations			
Do you want us to complete your rebate claim form?	YES / NO		
If so, please attach receipts (include donations to school)			
12. During the year the following transactions took place:			
<ul style="list-style-type: none"> ▪ Forgiveness of debt ▪ Property transactions ▪ I received proceeds from the sale of land/buildings (other than private dwelling) Please attach details	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>		
13. Working For Families Tax Credits / Parental Tax Credit			
If you or your partner had dependent children as at 1 April 2023 please complete the separate Working for Families Tax Credits and Parental Tax Credit questionnaire			
14. 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 Area	_____ M2
Repairs & Maintenance	\$ _____		
Rent paid	\$ _____	Total Area	_____ M2
Other	\$ _____		
Total	\$ _____		