

Individual Tax Return Questionnaire – 2026

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

Client Name		Phone:	
Balance Date	31 March 2026	E-mail:	

To: Harts Chartered Accountants

I instruct you to prepare my taxation return for the 2026 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 you would like any refunds deposited in to:

Account number: _____

Account name : _____

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: ▪ 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	☐ ☐ ☐ ☐ ☐	

Records and Information Required	✓	Comments
3. Overseas Bank Accounts, 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 <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. Bank Accounts – Please provide details of overseas bank account/s held: Additional accounts or information can be provided on a separate sheet. Bank Account name Account no. Bank Account name Account no. Bank Account name Account no.	☐ ☐ ☐ ☐	
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? If so, please attach receipts (include donations to school/s)	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 2025 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 Area _____ M2
Repairs & Maintenance	\$ _____	
Rent paid	\$ _____	Total Area _____ M2
Other	\$ _____	
Total	\$ _____	
14. Cryptoassets		
Have you received or traded in cryptoassets during the income year? If so, please provide the following information: • The type of cryptoasset • 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 cryptoasset held at the beginning and end of the year • Exchange records and bank statements • Wallet addresses	☐	