

Non-Resident Questionnaire – 2020

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

Client Name		Phone:	Work: Mobile: Home:
Balance Date	31 March 2020	E-mail:	

To: Harts Chartered Accountants

I instruct you to prepare my taxation return for the 2020 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
1. Wages YES / NO		
Please provide us with the names of any organisations you have received the following from: <ul style="list-style-type: none"> ▪ Wages with PAYE deducted in New Zealand 	<input type="checkbox"/>	
If wages were received, please send us the Customs records showing days of arrival/departure from New Zealand.	<input type="checkbox"/>	
In most cases Inland Revenue will have sent us these wages 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. <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. ▪ If any dividends are taken as bonus shares, also include these advice slips. 	<input type="checkbox"/> <input type="checkbox"/>	
3. Rental Income or Mixed Use Holiday Home YES / NO		
If applicable, please complete separate questionnaires for each property in New Zealand.	<input type="checkbox"/>	
4. Partnerships, Trusts, Estates and Companies in New Zealand - YES / NO		
Please supply details of income received.	<input type="checkbox"/>	
5. Have you bought or sold any property this year? - YES / NO		
If yes, please supply details	<input type="checkbox"/>	

6. Did you have any income from short term rentals, i.e. Airbnb - YES / NO		
If yes, please supply details.	<input type="checkbox"/>	
7. Any Other Income / Deductions		
<ul style="list-style-type: none"> ▪ Attach details of any other income derived in New Zealand ▪ 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"/> <input type="checkbox"/>	
8. Student Loans		
I have a student loan I have made voluntary payments of \$_____	<input type="checkbox"/>	