

Individual Tax Return Questionnaire – 2020

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

Client Name		Phone:	
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
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"/>	

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 2019 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 \$ _____
Repairs & Maintenance \$ _____
Rent paid \$ _____
Other \$ _____
Total \$ _____

Business Area _____ M2
Total Area _____ M2