

Individual Annual Questionnaire B 2023

Client Name:

I authorise you to prepare my tax return from the information and records I have supplied to you. I accept responsibility for the accuracy and completeness of all records and information supplied to you. You are authorised to communicate with my/our bankers, solicitors, finance companies and any other business that I/we deal with to obtain such information as you require to complete the above duties.

Signature:	Date:	Phone:	Email:
Bank account for tax refund: Name:		Account no:	

Information required to complete your tax return:

- 1. Did you receive income from wages / salaries / national superannuation / WINZ / ACC payments or income from employment with withholding tax deducted?
- 2. Have you received any **interest or dividend** income? *If yes, please attach interest and dividend certificates.*
- 3. Did you have an interest in, or receive any income from:

-	An estate or trust?	Name:
-	Partnership?	Name:
-	Company?	Name:

- 4. Did you receive any rent from properties? If yes, please complete separate Rental Questionnaire.
- 5. Do you have a property (such as a **holiday home**), **a boat or a plane** (with a market value of \$50,000 or greater) that is used privately and to derive income?
- 6. Bright-line Test for Sale of Residential Property Have you purchased and sold a residential property since 1 October 2015 which is not your main residence?
- 7. Do you have any **overseas** bank accounts, or any interest in overseas companies, unit trusts, life assurance policies or superannuation funds, or receive any other form of overseas income? Do you own any **overseas** property or have borrowed funds from overseas? *If yes to either of these, please request a separate Overseas Income Questionnaire or download from our website.* Have you arrived in / returned to NZ in the last 5 years? Please enter your date of arrival: _____/___/
- 8. Do you hold or have you held any crypto currency assets during the year?
- 9. Did you receive any other income from any other source?
- 9. Working for Families: were you a caregiver for a child under 19 years of age during the year?
- 10. Did you pay premiums **for income protection insurance**? *If yes, please attach a copy of the confirmation letter from your insurer showing the premiums paid and any claims.*
- 11. Do you have a student loan?

TICK

Already

provided/ in Xero

Xero

Yes	No/N/A	Already provided/ in Xero
Yes	No/N/A	Already provided/ in Xero

No/N/A

Yes

Yes	No/N/A	Already provided/ in Xero
Yes	No/N/A	Already provided/in

	No/N/A	
Yes		Already provided/in
		Voro

Yes	No/N/A	Already provided/ in Xero
Yes	No/N/A	Already provided/ in Xero
Yes	No/N/A	Already provided/ in Xero

Yes	No/N/A	Already provided/ in Xero
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Yes	No/N/A	Already provided/ in Xero
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Yes	No/N/A	Already provided/ in Xero
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Yes	No/N/A	Already provided/ in Xero
Yes	No/N/A	Already provided/ in Xero

- 12. Are you in Kiwisaver? If yes, please provide evidence to confirm your PIR rate.
- 13. Did you make any **donations**? *If yes, do you want us to complete your rebate claim form? Please attach receipts.*

Yes	No/N/A	Already provided/ in Xero
Yes	No/N/A	Already
res	NU/N/A	provided/ in

Xero

OTHER INFORMATION

If you have any other information, which you feel may be relevant to, or included in your tax return that has not been included in the above questions, please attach full details. i.e. any significant changes in your business, wealth or income.