



Individual Annual Questionnaire - 2024

Client name: _____

Phone: _____

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 bankers, solicitors, finance companies, and any other business that deal with to obtain such information as you require in order to complete the above duties.

Signature

Date

Would you prefer your accounts to be sent to you:

By
e-mail

By
post

I'll
collect

Information required to complete your tax return:

1 Salary, Wages and National Superannuation

| | |
|-----|----|
| Yes | No |
|-----|----|

Did you receive salary, wages or national super? (If so, IRD will supply us with the details)

2 Interest, Dividends & PIEs

| | |
|-----|----|
| Yes | No |
|-----|----|

Did you receive any interest & dividends during the year?

If so, please supply details of all interest and dividends received by enclosing dividend and Interest advice slips, Portfolio Investment Entity (PIE) income etc.

3 Overseas Income

| | |
|-----|----|
| Yes | No |
|-----|----|

Did you receive any income from overseas such as pensions, dividends and FIFs?

If so, please provide full details including :

type of income, payer, income type, tax jurisdiction, gross income and overseas tax.

4 Rent Received

| | |
|-----|----|
| Yes | No |
|-----|----|

If you received rental income, please complete the rental questionnaire included or download one from our website: www.theaccountingroom.co.nz

5 Other Income

| | |
|-----|----|
| Yes | No |
|-----|----|

Did you receive any other income such as estate or trust income, commissions etc? If so, please provide details.

6 Deductible Expenses

| | |
|-----|----|
| Yes | No |
|-----|----|

Did you have any deductible expenses such as premiums paid on income protection insurance, including **schedular's expenses**? (If so, please provide details).

7 Donation Rebates

| | |
|-----|----|
| Yes | No |
|-----|----|

Do you have any rebates to claim (School, Church or Charitable donations)?

If so, please supply the receipts and details of the bank account you would like the rebate paid into.

Bank Account number: _____

Account Name: _____

8 Family details

| | |
|-----|----|
| Yes | No |
|-----|----|

Some children, who may now be adults, may have been linked to our tax agency in previous years, when filing returns was optional. Please advise if you wish us to continue to file their returns.

Unless we are advised, we will delink them from our tax agency list.

Names of children returns ARE required for:

9 Crypto assets e.g. bitcoin

| | |
|-----|----|
| Yes | No |
|-----|----|

Have you received or traded in crypto assets during the income year?

If yes, please provide:

- The type of crypto asset
- 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 crypto asset held at the beginning and end of the year
- Exchange records and bank statements
- Wallet addresses

10 Only if you would like us to prepare your Working For Families; complete the section below

Eligibility for this credit varies depending on your family income and the number and age of your children. Therefore please provide the following information.

| | | |
|---|-----|----|
| If you had a child born within the current financial year you may be eligible for the Best Start or Parental Tax Credit. Please include their IRD number. | Yes | No |
| Where a child has become financially independent during the current financial year, please advise the date they left school or home. | Yes | No |
| If any child support or maintenance payments were made or received during the year, please provide details | Yes | No |
| Have you received other payments from any person or entities that are used for day-to-day living expenses (e.g. \$100 a week to pay the mortgage)? If the total amount is over \$5,000 a year , please provide the details. | Yes | No |
| Did any of your children receive passive income above a threshold of \$500? This includes all passive income, such as interest, rents or beneficiary income, received by a dependent child above a threshold of \$500 per year, per child. | Yes | No |
| Income of non-resident spouse or partner Also provide details of any worldwide income if your spouse or partner who isn't a tax resident in New Zealand is earning an income overseas. | Yes | No |

Children's details:

If we have prepared WFFTC for you before we only need their names and details of any **changes**.
E.g. left school

If this is the **first year** we are calculating, please provide all details:

Childs name, Date of Birth, IRD number, how many days per fortnight (if shared custody).

**Thank you for completing this questionnaire.
Please don't forget to sign the other side.**