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## Personal Tax Questionnaire

Name: \_\_\_\_\_ Email: \_\_\_\_\_

Year Ended: 31 March 2025

| INCOME                      | Comments   | Additional information to send                                     |
|-----------------------------|--|--|
| Interest                    | Bank deposits in your name   | RWT certificates from bank   |
| Dividends                   | Shares in your name  | Dividend Statements  |
| Rental Income               | This is income from properties in your personal name. Please ignore if your rental properties are owned by a Trust or Company  | See our rental accounts checklist                                  |
| Overseas Income             | Includes property, shares, bank deposits, pensions, salary   | Documents showing the income received and any foreign tax withheld |
| Overseas Assets             | In NZ certain overseas financial assets are taxed regardless of whether income was received  | Investment Statements showing balances at end of tax year          |
| Self-employed income        | This is income you received for work done which was not taxed as employment income / scheduler earnings  | Total income received for the tax year and all business expenses   |
| Estate Income               | You may be receiving income from an estate while the deceased's financial affairs are being sorted out   | Statement from Executors   |
| Trust Income                | Please ignore if we prepare tax returns for Trust which made the distribution.   | Distribution Statement   |
| Shareholder Salary          | Income you received as a shareholder. Please ignore if we prepared tax returns for the companies of which you are a shareholder.   |  |
| Other Income                | Any income (excluding employment income) not mentioned above.  | Documentation or Amounts received                                  |
|                             |  |  |
| EXPENSES                    |  |  |
| Donations                   | To charities and schools   | Tax receipts issued by the charity                                 |
| Income Protection Insurance | These can be claimed even if you are only earning income as an employee  | Correspondence from Insurer confirming amounts paid for tax year   |
|                             |  |  |
| WORKING FOR FAMILIES        |  |  |
|                             | If you or your partner are claiming working for families, please advise us as we need to file an additional tax return on your behalf  |  |
|                             | <b>Please provide details of:</b> <ul style="list-style-type: none"><li>• Children's names, date of birth and IRD numbers</li><li>• Child support payments received</li><li>• Children earning passive income exceeding \$500 per annum</li><li>• regular payments received to meet regular living expenses from family members / third parties exceeding \$5,000 per annum</li><li>• Income not already advised to us</li></ul> |  |

1. Declaration

I accept responsibility for the accuracy and completeness of the information supplied in the questionnaire which is to be used in the calculation of my personal income. You are not to complete an audit, nor do I wish you to undertake a detailed review of my affairs in to order to substantiate the accuracy of my information, and therefore you are not asked to provide any assurance on this information. I undertake your work can not be relied on to detect error and fraud and that you accept no liability for the accuracy and completeness of the information supplied by me.

I also accept responsibility for all other records and information supplied to you other than those listed above. I accept responsibility for any failure by me to supply all relevant records and information to you.

Signature: \_\_\_\_\_