

Questionnaire

Individual Income Tax Return

For the year ended 31 March 2025

Name.....

UPDATE DETAILS (indicate any changes if applicable):

Postal Address:

Physical Address:.....

Email Address:.....

Contact Number: Mobile Other:.....

Date of Birth:

The following checklist contains details of the information required to prepare your income tax return.

1. Residency

Have you been in New Zealand for the whole of the year (other than overseas holidays or short duration business trips)? Yes No

If no, please contact us as soon as possible to discuss your residency status.

2. Charitable donations tax credit (refer note 1)

Do you have donations to claim? Yes No

If yes, please attach receipts.

3. Salary and wage earners (refer note 2)

Did you derive salary and wage income during the year? Yes No

If yes, we will check your income sources against the details Inland Revenue holds.

To ensure this is correct, please provide names of the entities paying your salary/wage/director's fees during the year.

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4. Investment income (New Zealand sourced only) (refer note 3)

Did you receive New Zealand sourced investment income? **Yes No**

If **yes**, please provide the names of the entities you received investment income from below and attach copies of interest, dividend and PIE statements.

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5. Overseas income (refer note 4)

Did you receive or do you receive income from any of the following?

- | | | |
|--|------------|-----------|
| a. Overseas interest / dividends / royalties | Yes | No |
| b. Transfer / withdrawal of a lump sum from a superannuation fund or life insurance | Yes | No |
| c. An overseas pension / annuity | Yes | No |
| d. Overseas salary / wages / commissions | Yes | No |
| e. Overseas business income / self-employment income / consultancy or contract income | Yes | No |
| f. Overseas rental income | Yes | No |
| g. A distribution from an overseas trust or similar entity (whether capital or income) | Yes | No |
| h. A distribution from an overseas estate | Yes | No |

If **yes to any of the above**, please see note 4 for the information we require.

6. Overseas investments (refer note 5)

Did you have or do you have any of the following?

- | | | |
|---|------------|-----------|
| a. An overseas current / cheque account | Yes | No |
| b. An overseas call account / money-market account | Yes | No |
| c. An overseas fixed-term deposit | Yes | No |
| d. An overseas credit / debit card | Yes | No |
| e. An overseas mortgage / loan | Yes | No |
| f. An overseas digital wallet (e.g. Paypal, Google Wallet, Apple Pay) | Yes | No |
| g. Holdings in any digital currencies (e.g. Bitcoin, Monero) | Yes | No |
| h. Overseas bonds / notes / other financial arrangements | Yes | No |
| i. Shares in a foreign company / units in a foreign unit trust or mutual fund | Yes | No |

- j. A foreign portfolio with a portfolio manager, bank, bare trustee or nominee Yes No
- k. A foreign pension / provident / superannuation fund or an entitlement in a foreign pension Yes No
- l. A foreign annuity Yes No
- m. A foreign life insurance / assurance policy as a beneficiary or payee Yes No
- n. Ownership / interest in an overseas property situated outside New Zealand Yes No
- o. Holdings in precious metals / minerals, either physical or units (e.g. gold, silver, platinum) Yes No
- p. An interest in any offshore entity as a director, member, founder, trustee, protector, appointer, settlor or beneficiary? This includes entities without a separate legal personality (e.g. partnerships, joint ventures trusts and estates) and entities with separately legal personality (e.g. foundations, establishments, incorporated estates, corporations, limited partnerships and companies) Yes No

If yes to any of the above, please review note 5 of the notes for the information we require.

7. Income from other sources, e.g. partnership, estate, trust (refer note 6)

Did you receive income from other sources? Yes No

If yes, please complete the table below and attach copies of any relevant documents.

Entity's name	IRD number	Tax credits	Income/(loss)

8. Investments

Did you purchase any investments or sell any investments during the year. Yes No

If yes, please provide details.

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9. Rental income (refer note 7)

Did you receive income from a rental property? **Yes No**

If yes, please provide details of the income received and any expenses incurred. Please also complete the questions below.

If you have more than one rental property, please complete the questions below for each rental property.

Address of property:

Name of tenant:

Relationship of tenant to you:

Was the property available for rental for the full year? **Yes No**

If no, please advise the dates available for rent:

Was the property rented out as short-stay accommodation during the year (e.g. Airbnb, Bookabach, etc.)? **Yes No**

If yes, please advise:

The number days the property was rented out:

The number of days the property was used privately:

Were any rental properties purchased or sold during the year? **Yes No**

If yes, please provide documentation.

Are any of the above properties, commercial properties? **Yes No**

Are you GST registered for the rental activity? **Yes No**

If yes, please ensure that the rental income received, and total expenses detailed above are GST exclusive.

10. Income from Companies

Did you acquire any shares or exercise any options or rights to acquire shares under an employee share purchase or option scheme during the year? **Yes No**

If yes, please provide details:

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Have you derived any income/tax credits or incurred any loss from a look through company (LTC) during the year? **Yes No**

If yes, please complete the table below and attach a copy of the LTC's tax return.

Company	Income/(loss)	Tax credits

Were any shareholder salaries or director's fees received without tax deducted at source during the year? Yes No

If **yes**, please complete the table below (attach a separate sheet if necessary):

Payer	IRD number	Income

11. Deductible expenses

Did you incur any of the following deductible expenses during the year?

- Premiums paid for loss of earnings (income protection) insurance. Yes No
- Management fees or similar on investment portfolios. Yes No
- Interest on money borrowed to buy shares or to invest. Yes No
- Expenses incurred in earning income which has had withholding tax deducted. Yes No

If **yes** to any of the above, please advise the amount paid and attach supporting documents.

12. Student loans

Do you have a student loan? Yes No

If **yes**, we will link your loan account to our agency list with Inland Revenue to allow us to check the repayment calculation.

13. Income from the sale of land and/or buildings

Did you sell any properties in the 2025 year? Yes No

If **yes**, was the property your main home? Yes No

If **no**, please provide details:

- Sale & purchase agreement date (of sale):
.....
- Settlement date (of sale):
.....
- Sale price:
- Registration of title date:
- Settlement date (of purchase):
- Purchase price:

14. Other income

Did you receive any income during the year that is NOT listed elsewhere? **Yes** **No**

If **yes**, please provide details below:

Source	Amounts

15. Were you party to any of the following during the year?

- A forward or future contract? **Yes** **No**
- Arrangements where options are held over property? **Yes** **No**
- Arrangements in respect of property where payment took place sometime after settlement? **Yes** **No**

If **yes**, please provide details:

16. How would you prefer to receive your completed income tax return?

Preferred email address _____

17. Bank account details

Inland Revenue will pay any refund by direct credit to a nominated bank account. Please advise your bank account details to be disclosed to Inland Revenue, should a refund be due.

Bank Branch Account Number Suffix

Client Declaration

This is a true and complete record of all transactions for the year.

Client's Signature

Date