

Name: _____

2026 Annual Personal Questionnaire

Information required for financial statements and tax returns.

Please ensure this form is completed in full. Only complete the sections of the questionnaire if you answer "yes" to the relevant question.

<p>1 Income Summary of Earnings</p> <p>Note: As your tax agent, Inland Revenue makes available your New Zealand Summary of Earnings information, to our office, for the financial year.</p>		
<p>2 Income - Dividend and Interest</p> <p>Have you received any interest or dividends during the financial year?</p> <p>Please provide the following information and distinguish between personal and joint investments:</p> <ul style="list-style-type: none"> - Interest received certificates - Dividend received payment advice notices <p>Note: It is important that you provide us with all dividend and interest advice slips as this will ensure that we claim the maximum amount of imputation credits and resident resident withholding tax already paid on your behalf.</p>	<p>YES</p> <input type="checkbox"/> <p>Enclosed</p> <input type="checkbox"/> <input type="checkbox"/>	<p>NO</p> <input type="checkbox"/> <p>N/A</p> <input type="checkbox"/> <input type="checkbox"/>
<p style="text-align: right;">If "No" go to Question: 3</p>		
<p>3 Income - Overseas</p> <p>Do you have ANY money in an overseas bank account or ANY other investments overseas, including superannuation pension schemes, life insurance policies, shares and bonds?</p> <p>Please provide the following details for all overseas bank accounts and investments, even if they do not pay dividends, including:</p> <ul style="list-style-type: none"> - Name of Bank or Investment Company and country of residence (if known) - Date of purchase, sale and/or investment - Original cost prices of shares or units (if known) - Number of shares held and market value at the beginning and end of the financial year - Please supply a copy of all documents regarding investments 	<p>YES</p> <input type="checkbox"/> <p>Enclosed</p> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<p>NO</p> <input type="checkbox"/> <p>N/A</p> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
<p style="text-align: right;">If "No" go to Question: 4</p>		
<p>4 Income - Superannuation Brought Onshore</p> <p>If you have moved to NZ, have you received a lump sum withdrawal from a foreign superannuation scheme?</p> <p>If "yes," please supply the documents including date of payment and amount.</p>	<p>YES</p> <input type="checkbox"/> <p>Enclosed</p> <input type="checkbox"/> <input type="checkbox"/>	<p>NO</p> <input type="checkbox"/> <p>N/A</p> <input type="checkbox"/> <input type="checkbox"/>
<p style="text-align: right;">If "No" go to Question: 5</p>		

5 Income - Received from Other Entities

Please provide details of all income from the following:

- Estates and/or Trusts
- Partnerships
- Companies
- Look-through Companies
- Any other entities

Enclosed N/A

If "N/A" go to Question:
6

Note: Only required if we do not prepare the financial accounts for these entities

6 Income - Income or Losses from Sale of Shares, Land and Buildings and Other Assets

Have you disposed of any shares, land and buildings or other investments during the financial year?

YES NO

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If "No" go to Question:
7

Please provide the following:

- Type of investment
- Income / (losses) received
- Purchase date and price (amount paid)
- Sale date and price (amount received)

Enclosed N/A

In certain circumstances the sale of assets, such as land (including buildings) or shares, may be assessable, including where the taxpayer trades in the asset and/or where the asset is purchased with an intention of resale.

Land and Buildings

If you sell a residential property on or after 1 July 2024, the brightline test will apply if your brightline end date is within two years of your brightline start date.

7 Income - Rents

Please provide details of any rents received during the financial year.

Enclosed N/A

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If "N/A" go to Question:
8

Note: If you have not received a separate Rental Questionnaire please contact our office.

8 Income - Any Other Income

Have you received any other income including overseas salaries, wages, other pensions, family support, annuities, commissions, royalties etc for the financial year?

YES NO

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If "No" go to Question:
9

Please provide the following information:

- Overseas salaries & wages
- Overseas and other pensions
- Family support documents
- Annuities received
- Commissions and /or royalties
- Other

Enclosed N/A

9 Tax Residence

Have you only resided in New Zealand throughout the financial year from 1 April 2025 to 31 March 2026?

YES	NO
<input type="checkbox"/>	<input type="checkbox"/>

If "No" go to Question: 10

If you have answered "no," please provide the details for the period you resided outside of New Zealand, including applicable dates.

Enclosed	N/A
<input type="checkbox"/>	<input type="checkbox"/>

Do you have any plans to reside overseas during the 1 April 2026 to 31 March 2027 period?

YES	NO
<input type="checkbox"/>	<input type="checkbox"/>

10 Expenses - Contracting Income

Did you receive contractor income from which withholding tax is deducted (i.e. Schedular Income)?

YES	NO
<input type="checkbox"/>	<input type="checkbox"/>

If "No" go to Question: 11

If "yes" you may be able to claim various expenses against this income and therefore reduce your income tax. Please provide details of expenses that are relevant to your employment.

These may include the following:

- Advertising
- Communication Expenses, i.e. telephone, internet, fax etc
- Home Office Costs
- ACC
- Subscriptions for professional membership
- Vehicle Expenses
- Other

Enclosed	N/A
<input type="checkbox"/>	<input type="checkbox"/>

11 Expenses - Income Protection Insurance

Do you have Income Protection Insurance?

YES	NO
<input type="checkbox"/>	<input type="checkbox"/>

If "No" go to Question: 12

The premiums payable on Income Protections Insurance policies **MAY** be claimed as an expense in your tax return. This depends on the type of policy you have. Please provides us with a copy of the policy and details of premiums paid during the year.

Enclosed	N/A
<input type="checkbox"/>	<input type="checkbox"/>

- Payer

- Amount

12 Expenses - Commission Deductions

Please supply details of commissions deducted from interest received on investments with solicitors, including amounts and dates.

Enclosed	N/A
<input type="checkbox"/>	<input type="checkbox"/>

If "N/A" go to Question: 13

- Amount

13 Mixed Use Assets

Did you have any of the following assets which is used both privately and for income earning use, and is also unused for 62 days or more during the financial year?

- A property (such as a holiday home)
- A ship, boat, or similar craft
- An aircraft

YES	NO
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>

If "No" go to Question: 14

Please note "private use" of an asset is by you, your family or associated people. It can also include use (by any other person) who is charged or pays you less than 80% of market rate.

If you have any of the above please advise and provide:

- The number of days the asset was used to derive income
- The number of days the asset was used for private purposes
- The number of days it was unused
- Total income received (including from income earning days and "private" days
- Expenses relating to the asset for the year (e.g. rates, power, insurance, fuel etc)

<input type="text"/>	days
<input type="text"/>	days
<input type="text"/>	days
\$ <input type="text"/>	
\$ <input type="text"/>	

14 Rebate for Donations

If you would like us to complete your Rebate IR526 form please provide receipts for all Donations of \$5, or more paid, during the financial year, to approved charities and schools

Enclosed	N/A
<input type="checkbox"/>	<input type="checkbox"/>

If "N/A" go to Question: 15

15 Working for Families Tax Credits

You may be entitled to receive working for families tax credits (WFFTC) if:

- during the income year you have been a principal caregiver of one or more dependent children; and
- certain resident tests are satisfied for you or the particular dependent child/children

If you qualify for a WFFTC, the amount of entitlement will depend on various factors, including your level of 'family scheme income.'

Do you consider you may qualify for a WFFTC?

Yes	No
<input type="checkbox"/>	<input type="checkbox"/>

If "No" go to Question: 16

If "yes," please complete the attached WFFTC worksheet so your entitlement can be determined

16 Student Loan

Do you have a student loan?

YES	NO
<input type="checkbox"/>	<input type="checkbox"/>

If "No" go to Question: 17

If "yes" please provide the loan balance

\$ <input type="text"/>

17 Cryptocurrency

Do you own any cryptocurrency assets?

YES	NO
<input type="checkbox"/>	<input type="checkbox"/>

If "No" go to Question: 18

If yes, please provide details of the transactions you have made, including purchases, sales for fiat currency and transfers between cryptocurrencies.

Enclosed	N/A
<input type="checkbox"/>	<input type="checkbox"/>

Working for Families Tax Credit Worksheet

Please provide responses to the questions below in as much detail as possible so your entitlement to working for families tax credits (WFFTC's) can be calculated correctly.

PART ONE			
Registration		YES	NO
Have you registered for WFFTC's?		<input type="checkbox"/>	<input type="checkbox"/>
Have you received WFFTC payments during the financial year?		<input type="checkbox"/>	<input type="checkbox"/>
Details of your dependent child or children			
- Name			
- Date of Birth			
- Date left school (if applicable)			
- Working			
- IRD Number			
Correspondence with Inland Revenue		YES	NO
Have you received any correspondence from Inland Revenue or Work and Income regarding your entitlement to WFFTC's, including any correspondence regarding a change circumstances?		<input type="checkbox"/>	<input type="checkbox"/>
If "yes," please provide a copy of the correspondence		Enclosed	N/A
		<input type="checkbox"/>	<input type="checkbox"/>
Change in Family Circumstances		YES	NO
Have you had a change in your family circumstances (e.g. marriage, new relationship, separation etc)?		<input type="checkbox"/>	<input type="checkbox"/>
If "yes," please provide details of the change in circumstance, including the start date		Enclosed	N/A
		<input type="checkbox"/>	<input type="checkbox"/>
Child Support Payments		YES	NO
Have you or your partner <u>received</u> any child support payments during the financial year, either from Inland Revenue or as part of a private arrangement?		<input type="checkbox"/>	<input type="checkbox"/>
Have you or your partner <u>made/paid</u> any child support payments during the financial year, either via Inland Revenue or via private arrangement?		YES	NO
		<input type="checkbox"/>	<input type="checkbox"/>
If "yes" to either question, please provide details for those payments including dates and amounts		Enclosed	N/A
		<input type="checkbox"/>	<input type="checkbox"/>

Passive Income of Children	YES	NO
Have your children, that are currently living with you, received any passive income (e.g. interest)?	<input type="checkbox"/>	<input type="checkbox"/>
	Enclosed	N/A
If "yes," please provide details for that income	<input type="checkbox"/>	<input type="checkbox"/>

Working for Families Tax Credit Worksheet (continued)

PART TWO

Interest or Dividend Income	YES	NO
Have you or your partner earned any interest or dividend income from the bank, investments, or from family trusts?	<input type="checkbox"/>	<input type="checkbox"/>
	Enclosed	N/A
If "yes," please provide details for that income (if not already provided)	<input type="checkbox"/>	<input type="checkbox"/>

Attributable Trustee Income	YES	NO
Are you the settlor of a trust?	<input type="checkbox"/>	<input type="checkbox"/>
If "yes," and Baker Tilly does not prepare the tax return for that trust, please provide the following details:	Enclosed	N/A
- Trustee income for that trust for the financial year?	<input type="checkbox"/>	<input type="checkbox"/>
- Any beneficiary income distributed from the trust for the financial year?	<input type="checkbox"/>	<input type="checkbox"/>
- The taxable income, for the financial year, for any companies that the trust, and persons associated with the trust, together had a 50% interest in at the end for the financial year.	<input type="checkbox"/>	<input type="checkbox"/>

Close Company Income	YES	NO
Do you have a 10% or greater voting interest in a company?	<input type="checkbox"/>	<input type="checkbox"/>
If "yes," and Baker Tilly does not prepare the tax return for that company, please provide:	Enclosed	N/A
- The taxable income for that company, for the financial year; and	<input type="checkbox"/>	<input type="checkbox"/>
- Details for any dividends paid by the company during the financial year	<input type="checkbox"/>	<input type="checkbox"/>

Other Payments	YES	NO
Have you received any other payments from anybody that were used for day-to-day living expenses (e.g. \$100 per week from parents to help pay for the mortgage, power or telephone)?	<input type="checkbox"/>	<input type="checkbox"/>
	Enclosed	N/A
If "yes," Please provide us with details and the total income received.	<input type="checkbox"/>	<input type="checkbox"/>

Partner's Overseas Income	YES	NO
Has your partner received any overseas income if he/she is not a tax resident in New Zealand?	<input type="checkbox"/>	<input type="checkbox"/>
If "yes," please provide details for that income and provide any related documentation (i.e. payslips)	Enclosed	N/A
	<input type="checkbox"/>	<input type="checkbox"/>
Fringe Benefits for Shareholder Employees	YES	NO
Do you, and any associated person, together hold 50% or more of the voting interest in a company?	<input type="checkbox"/>	<input type="checkbox"/>
If "yes," did you receive any fringe benefits from the company?	<input type="checkbox"/>	<input type="checkbox"/>
If you answers "yes" to the questions immediately above, please provide details of the fringe benefits you received from the company for the financial year.	Enclosed	N/A
	<input type="checkbox"/>	<input type="checkbox"/>
Portfolio Investment Entity Income	YES	NO
Did you or your partner derive any PIE Income (except from Kiwisaver or a Superannuation Scheme)?	<input type="checkbox"/>	<input type="checkbox"/>
If "yes," please provide details for that income and provide any related documentation.	Enclosed	N/A
	<input type="checkbox"/>	<input type="checkbox"/>

Working for Families Tax Credit Worksheet (continued)

Income from Trusts, Estate or a Māori Authority	YES	NO
Have you or your partner received any income as a beneficiary of a Trust, Estate or a Māori Authority?	<input type="checkbox"/>	<input type="checkbox"/>
If "yes," please provide details for that income and provide any related documentation (if not provided already)	Enclosed	N/A
	<input type="checkbox"/>	<input type="checkbox"/>
Royalty Income	YES	NO
Have you or your partner received any royalties for the right to use a copyright or a trademark?	<input type="checkbox"/>	<input type="checkbox"/>
If "yes," please provide details for that income and provide any related documentation (if not provided already)	Enclosed	N/A
	<input type="checkbox"/>	<input type="checkbox"/>

If you receive more WFFTC's than you are entitled to, the government will require repayment of the amounts you have received over and above what you are entitled to receive. Consequently, it is important that this worksheet is completed correctly. Please contact us if any part of the worksheet requires clarification.

If you receive WFFTC's progressively during an income year, it is important to immediately notify the Inland Revenue of any changes in your circumstances that may be relevant in determining your entitlement, so that any required adjustments can be made to the payments you receive.

You can read more about determining your entitlement to WFFTC's on the Inland Revenue website (www.ird.govt.nz) - simply type in "Working for Families" in the search information bar.