

# 2018 INDIVIDUAL TAX QUESTIONNAIRE

Financial year ended 31 March 2018

Client Name: \_\_\_\_\_

## To BHW Ltd

I hereby instruct you to prepare my financial accounts and taxation returns for the year/period ending \_\_\_\_\_.

I undertake to supply all information necessary to carry out such services, and will be responsible for the accuracy and completeness of information provided.

You are hereby authorised to communicate with my Bankers, Solicitors, and Finance Companies and all government agencies to obtain such further information as you may require in order to carry out the above assignment. Our existing Terms of Engagement with BHW Ltd are accepted as applying to this and future assignments until we agree otherwise.

Client's signature \_\_\_\_\_ Dated: \_\_\_\_\_

### Checklist of Records Required:

*(a detailed explanation of the requirements for each of these items is provided over leaf)*

**Enclosed**  
✓ or NA

- |                                                                       |                          |
|-----------------------------------------------------------------------|--------------------------|
| 1. Residency                                                          | <input type="checkbox"/> |
| 2. NZ Investment Income                                               | <input type="checkbox"/> |
| 3. Overseas Investment Income                                         | <input type="checkbox"/> |
| 4. Rent Received – Complete Rental Questionnaire                      | <input type="checkbox"/> |
| 5. Other Income                                                       | <input type="checkbox"/> |
| 6. Claimable Expenses                                                 | <input type="checkbox"/> |
| 7. Rebates                                                            | <input type="checkbox"/> |
| 8. Working for Families – Complete Working for Families Questionnaire | <input type="checkbox"/> |

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**Please check the list below to ensure you have provided all the applicable information and return this completed questionnaire with your records. Incomplete information may cause delays in completing your return.**

## 1. Residency

- Temporary Tax Exemption on foreign income for new immigrants  
Did you become a New Zealand tax resident on or after 1<sup>st</sup> April 2010? Yes / No
- Are you a returning New Zealander who has not resided in NZ for at least 10 years prior to your arrival in NZ? Yes / No

## 2. New Zealand Investments

- Interest Certificates Enclosed / N/A
- Dividend Certificates Enclosed / N/A
- Portfolio Investment Equity (PIE) statements Enclosed / N/A

## 3. Overseas Investments

- Interest Certificates Enclosed / N/A
- Details of overseas shares, foreign unit trusts, foreign insurance policies, foreign superannuation or pension funds held at any time during the year Enclosed / N/A
- Any other form of foreign income Enclosed / N/A

## 4. Other Income

Income Sources where we don't prepare the annual accounts, please provide the following:

- Estate or Trust Income Enclosed / N/A
- Partnership Income Enclosed / N/A
- Shareholders Salary Enclosed / N/A
- Overseas Pensions Enclosed / N/A
- Look Through Company (LTC) Losses Enclosed / N/A
- Royalties Enclosed / N/A

## 5. Rent Received

- Please complete the Rental Questionnaire

## 6. Claimable Expenses

- Income Protection Insurance Enclosed / N/A
- Interest on borrowings relating to taxable income Enclosed / N/A

## 7. Rebates

- Donations (attach receipts) Enclosed / N/A

## 8. Overseas Pensions

- If you transferred a pension scheme to New Zealand and you are uncertain about your tax obligations call us and provide documents for any transactions. Enclosed / N/A

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## 9. Working for Families

- Please complete the Working for Families Questionnaire

## 10. Other Comments

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## Confirmation of Contact Details

Postal Address: \_\_\_\_\_

Email Address: \_\_\_\_\_

Contact Number(s): \_\_\_\_\_

## Bank Account Details (Required for IRD Refunds)

Bank Account Name: \_\_\_\_\_

Bank Account Number: \_\_\_\_\_

**THANK YOU**

**Please make sure all the checklist boxes are complete, you have signed the front page and you have enclosed the records required.**