## Individual Questionnaire - 31 March 2022

| Ensure this question  | naire is completed and included with your records  |                   |  |  |  |  |  |
|---|--|-------------------|--|--|--|--|--|
| Client Name:  |  | Pho               | one:   |  |  |  |  |
|   |  |                   |  |  |  |  |  |
| IRD Number:   |  | Em                | nail:  |  |  |  |  |
| Balance Date:   | 31 March 2022  |                   |  |  |  |  |  |
| To: Shore Chartered   | Accountants Limited  |                   |  |  |  |  |  |
| Terms of Engagement   |  |                   |  |  |  |  |  |
|   | and staff/contractors as applicable to prepare my Taxation necessary to carry out such services and will be respons  |                   |  |  |  |  |  |
| all tax types (except of  | btain information from Inland Revenue, other governmer shild support), bank and loan accounts in order to comple hrough all Inland Revenue media and communication cha   | ete the           | above assignments. This includes                                       |  |  |  |  |
| your organisation to que<br>Business. This authori<br>information to other m  | sation to act as my agent for ACC levy purposes for all as<br>uery and change information on my ACC levy account(s) to<br>ity will also allow your organisation's main representative<br>numbers of your organisation. Other delegated members<br>rmation on my ACC levy account.  | through<br>discre | n ACC staff, and through MyACC for strain to delegate access to my ACC |  |  |  |  |
| You are to represent me as my tax agent. All income tax returns will be signed by me however you are authorised to sign any other taxation return on behalf of myself or any of my associated entities. |  |                   |  |  |  |  |  |
| accounts are due for p  | have the right to charge interest on overdue accounts a sayment by the 20 <sup>th</sup> of the month following invoice date. That any collection costs you incur will be fully recoverable from the following incurs will be followed in the following incurs will be fully recoverable from the following incurs will be followed in the following incurs will be followed in the following incurs will be followed in the followe | he cha            | arging of such interest will be at your                                |  |  |  |  |
| Signature   | Date   |                   |  |  |  |  |  |
| Records Requi   |  | ✓                 | Comments   |  |  |  |  |
| Wages/National S  | uperannuation/Benefits   |                   | 1  |  |  |  |  |
| following from:  • Wages  | th the names of any organisations you have received the  |                   |  |  |  |  |  |
| <ul><li>ACC payments</li><li>National Superann</li></ul>  | uation   |                   |  |  |  |  |  |
| <ul> <li>Any other benefits</li> </ul>  | dation   |                   |  |  |  |  |  |
| In most cases IRD witto check all details ha  | Ill have sent us these details direct, however we do need ave been included.   |                   |  |  |  |  |  |
| Student Loan  |  |                   |  |  |  |  |  |
| Do you have a stude   | nt loan?   |                   |  |  |  |  |  |
| If so, please provide   | your latest statement from IRD   |                   |  |  |  |  |  |
| Interest and Divid  | ends   |                   |  |  |  |  |  |
| Please supply the ad  | vice slips.  |                   |  |  |  |  |  |
|   | ed, you should have an annual advice notice showing the ducted. This may be on the bottom of your bank   |                   |  |  |  |  |  |

statement dated 31 March

• If any dividends are taken as bonus shares, also include these advice slips

| Rental and Leased Property  |        |                                  |  |  |  |  |
|---|--------|----------------------------------|--|--|--|--|
| Please complete attached rental questionnaire   |        |                                  |  |  |  |  |
| Mortgage Interest Paid on Residential Properties  |        |                                  |  |  |  |  |
| Have you incurred interest on residential properties owned (which is not your main family home)? Is the interest also against properties other than residential rentals? If so, please provide details of amount of interest and dates paid.  |        |                                  |  |  |  |  |
| Partnerships, Trusts, Estates and Companies   |        |                                  |  |  |  |  |
| Please supply details of income earned from any entity for which we do not prepare the accounts and tax returns.  |        |                                  |  |  |  |  |
| Overseas  | 1      |                                  |  |  |  |  |
| <ul> <li>Supply details of overseas interest, dividends, wages received, and taxation paid</li> <li>Provide details of any overseas investments held at any time during the financial year</li> <li>Attach all of your investments advisor's reports</li> <li>Have you at any point in your lifetime, ever contributed to a foreign superannuation scheme, even if you cannot receive the benefits until you retire?</li> </ul> |        |                                  |  |  |  |  |
| Any Other Income  | 1      |                                  |  |  |  |  |
| Attach details:  Income Replacement Insurance Policy – provide details of premiums and claims  Look Through Company – if you have been allocated a share of a loss other than from a company that we are aware of, please provide details  Did you receive non-taxable income from any other sources? If Yes, please provide details.   |        |                                  |  |  |  |  |
|   |        |                                  |  |  |  |  |
| Cryptoassets  |        |                                  |  |  |  |  |
| Have you received or traded in cryptoassets during the income year? If so, plea   | se pro | ovide the following information: |  |  |  |  |
| <ul> <li>The type of cryptoasset</li> <li>For each transaction provide the date, type of transaction i.e. received or disposed of, number of units, value in NZD</li> <li>Total units of each cryptoasset held at the beginning and end of the year</li> <li>Exchange records and bank statements</li> <li>Wallet addresses</li> </ul>  |        |                                  |  |  |  |  |
| Working for Families Tax Credits and Parental Tax Credit  | ı      |                                  |  |  |  |  |
| Please supply full names and birth dates of all children. Please note the following:  |        |                                  |  |  |  |  |
| <ul> <li>If you had a child born within the current financial year you may be eligible for the Parental Tax Credit. Please include their IRD Number below. If you do not have this you will need to obtain one for them in order to claim any entitlement for them</li> <li>Where a child has become financially independent during the current financial year, please advise the date they left school or home</li> </ul>      |        |                                  |  |  |  |  |
|   |        |                                  |  |  |  |  |

| Child's Name   | IRD No.         |   | Date of Birth | Date left School |
|--|-----------------|---|---------------|------------------|
|  |                 | _ |               |                  |
|  |                 |   |               |                  |
| If you have received Working for Families Tax Credits during the supply the certificate issued to you by IRD, detailing the amount   |                 |   |               |                  |
| Also provide details of any child support or maintenance payments made or received.  |                 |   |               |                  |
| If we do not prepare your spouse or partner's taxation return, pus with details of their income.   | lease provide   |   |               |                  |
| Have there been any changes to your family circumstances, including a change in responsibility for your dependent child(ren), you have married, separated or otherwise changed your family circumstances? If so, please provide details.   |                 |   |               |                  |
| Do you share custody of your child(ren) with anyone other than If so, please provide details.  | n your partner? |   |               |                  |
| Did you work on average less than 20 hours per week if single or did you and your spouse / partner combined work less than 30 hours per week? If so, please provide details.   |                 |   |               |                  |
| Additional income information - Working for Familie  | s Tax Credits   | l |               |                  |
| You are required to supply details of income received from the sources:  | following       |   |               |                  |
| <ul> <li>Salary exchanged for private use of a work</li> <li>Vouchers and other short-term charge facilities</li> <li>Major shareholder in a close company</li> <li>Non-locked-in PIE income</li> <li>Certain pensions and annuities</li> <li>Distributions from retirement savings schemes</li> <li>Distributions from superannuation schemes</li> <li>Tax-exempt overseas pensions</li> <li>Tax-exempt salary or wages</li> <li>Other income (if you or your partner get more than \$5000 p with your living costs)</li> <li>Children's passive income</li> <li>Non-resident spouse or partner's income</li> <li>Non-beneficiary distributions from a trust</li> <li>Non-resident borrower's overseas income</li> <li>Losses</li> <li>Settlor's attributable trustee income</li> <li>Attributable fringe benefits</li> <li>Main income equalisation scheme deposits</li> <li>Main income equalisation scheme refunds</li> <li>Retirement savings schemes contributions</li> <li>Income from a retirement savings or superannuation scheme</li> <li>Depreciation recovered on sale of a building</li> </ul> | e PIE           |   |               |                  |
| A detailed description and examples of above income types is the IRD website:  |                 |   |               |                  |

| Residential Land Withholding Tax   |             |                                |   |
|--|-------------|--------------------------------|---|
| Have you sold residential property in New Zealand where Residential Lan Withholding Tax has been deducted and paid to the IRD? If so, provide dee.g. IR1100 Residential land withholding tax return and other sale and purchase documents.                         |             |                                |   |
| Residential Property Sales   |             |                                |   |
| Have you sold any residential property during the year (not otherwise deta on the information provided)?   | ailed 🔲     |                                |   |
| If yes, when was the property purchased?   |             | -                              | - |
| If it was purchased within 10 years of the sale date,  |             |                                |   |
| what was the original purchase price   |             | \$                             | - |
| • and the sale price?  |             | \$                             | _ |
| <ul> <li>has it been used as your main home for the full time it has been<br/>owned? If not, please provide dates and details on the nature of<br/>shared use.</li> </ul>  | f the       |                                |   |
| Mixed Use Holiday Home   |             |                                |   |
| Do you have a property (such as a holiday home or a bach) that is used privately and also to derive income?  Yes \( \subseteq \text{No} \( \subseteq \)  |             |                                |   |
| If yes, provide details of property:   |             |                                |   |
| If yes, please complete the following section so we can determine the ame  Mixed Use Holiday Home – Information Required  The number of days the property was empty during the income year  The number of days the asset was used by family or associated persons* | during the  |                                |   |
| OR where income from any person received was less than 80% of marker * Associated persons include close relatives, or if owned by an entity, persons associated persons include close relatives.   |             | the entity owning the property |   |
| If there is more than one tenant who used the property through the year, p  Name of tenant:  |             | ch details.                    |   |
| Relationship to owner (if any):  |             |                                |   |
| Amount of rent they paid: \$  Dates rented (From: To)  |             |                                |   |
| Expenses incurred in respect of the property (the list below is not exhaust required):   | ive – detai | s of all expenses will be      |   |
| Cost of advertising for tenants  |             | \$                             |   |
| Cost of repairing damages caused by tenants  |             | \$                             |   |
| Number of days spent in the property while repairing damages caused by   | tenants     |                                |   |
| Mortgage interest  |             | \$                             |   |
| Rates  |             | \$                             |   |
| Insurance  |             | \$                             |   |
| Repairs/maintenance for general wear and tear  |             | \$                             |   |
| Other (please give details) :  |             |                                |   |

## Thank you for completing this questionnaire Don't forget to sign it