

Individual Questionnaire – 31 March 2022

Ensure this questionnaire is completed and included with your records

Client Name:		Phone:	
IRD Number:		Email:	
Balance Date:	31 March 2022		

To: Shore Chartered Accountants Limited

Terms of Engagement

I hereby instruct you and staff/contractors as applicable to prepare my Taxation Returns for the 2022 year. I undertake to supply all information necessary to carry out such services and will be responsible for the accuracy and completeness of such information.

Authority is given to obtain information from Inland Revenue, other government agencies and financial institutions about all tax types (except child support), bank and loan accounts in order to complete the above assignments. This includes obtaining information through all Inland Revenue media and communication channels including electronic ones.

I authorise your organisation to act as my agent for ACC levy purposes for all associated entities. This authorisation allows your organisation to query and change information on my ACC levy account(s) through ACC staff, and through MyACC for Business. This authority will also allow your organisation's main representative discretion to delegate access to my ACC information to other members of your organisation. Other delegated members of your organisation will also be able to query and change information on my ACC levy account.

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.

I also accept that you have the right to charge interest on overdue accounts at the rate of 1.5% per month, and that all accounts are due for payment by the 20th of the month following invoice date. The charging of such interest will be at your discretion. I accept that any collection costs you incur will be fully recoverable from me.

Signature _____ Date _____

Records Required	✓	Comments
Wages/National Superannuation/Benefits		
Please provide us with the names of any organisations you have received the following from: <ul style="list-style-type: none">WagesACC paymentsNational SuperannuationAny other benefits In most cases IRD will have sent us these details direct, however we do need to check all details have been included.	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	
Student Loan		
Do you have a student loan? If so, please provide your latest statement from IRD	<input type="checkbox"/>	
Interest and Dividends		
Please supply the advice slips. <ul style="list-style-type: none">For interest received, you should have an annual advice notice showing the withholding tax deducted. This may be on the bottom of your bank statement dated 31 MarchIf any dividends are taken as bonus shares, also include these advice slips	<input type="checkbox"/> <input type="checkbox"/>	

Residential Land Withholding Tax

Have you sold residential property in New Zealand where Residential Land Withholding Tax has been deducted and paid to the IRD? If so, provide details e.g. IR1100 Residential land withholding tax return and other sale and purchase documents.

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Residential Property Sales	
Q1 2023	120
Q2 2023	135
Q3 2023	150
Q4 2023	165
Q1 2024	180
Q2 2024	195
Q3 2024	210
Q4 2024	225
Q1 2025	240
Q2 2025	255
Q3 2025	270
Q4 2025	285
Q1 2026	300
Q2 2026	315
Q3 2026	330
Q4 2026	345
Q1 2027	360
Q2 2027	375
Q3 2027	390
Q4 2027	405
Q1 2028	420
Q2 2028	435
Q3 2028	450
Q4 2028	465
Q1 2029	480
Q2 2029	495
Q3 2029	510
Q4 2029	525
Q1 2030	540
Q2 2030	555
Q3 2030	570
Q4 2030	585
Q1 2031	600
Q2 2031	615
Q3 2031	630
Q4 2031	645
Q1 2032	660
Q2 2032	675
Q3 2032	690
Q4 2032	705
Q1 2033	720
Q2 2033	735
Q3 2033	750
Q4 2033	765
Q1 2034	780
Q2 2034	795
Q3 2034	810
Q4 2034	825
Q1 2035	840
Q2 2035	855
Q3 2035	870
Q4 2035	885
Q1 2036	900
Q2 2036	915
Q3 2036	930
Q4 2036	945
Q1 2037	960
Q2 2037	975
Q3 2037	990
Q4 2037	1005
Q1 2038	1020
Q2 2038	1035
Q3 2038	1050
Q4 2038	1065
Q1 2039	1080
Q2 2039	1095
Q3 2039	1110
Q4 2039	1125
Q1 2040	1140
Q2 2040	1155
Q3 2040	1170
Q4 2040	1185
Q1 2041	1200
Q2 2041	1215
Q3 2041	1230
Q4 2041	1245
Q1 2042	1260
Q2 2042	1275
Q3 2042	1290
Q4 2042	1305
Q1 2043	1320
Q2 2043	1335
Q3 2043	1350
Q4 2043	1365
Q1 2044	1380
Q2 2044	1395
Q3 2044	1410
Q4 2044	1425
Q1 2045	1440
Q2 2045	1455
Q3 2045	1470
Q4 2045	1485
Q1 2046	1500
Q2 2046	1515
Q3 2046	1530
Q4 2046	1545
Q1 2047	1560
Q2 2047	1575
Q3 2047	1590
Q4 2047	1605
Q1 2048	1620
Q2 2048	1635
Q3 2048	1650
Q4 2048	1665
Q1 2049	1680
Q2 2049	1695
Q3 2049	1710
Q4 2049	1725
Q1 2050	1740
Q2 2050	1755
Q3 2050	1770
Q4 2050	1785
Q1 2051	1800
Q2 2051	1815
Q3 2051	1830
Q4 2051	1845
Q1 2052	1860
Q2 2052	1875
Q3 2052	1890
Q4 2052	1905
Q1 2053	1920
Q2 2053	1935
Q3 2053	1950
Q4 2053	1965
Q1 2054	1980
Q2 2054	1995
Q3 2054	2010
Q4 2054	2025
Q1 2055	2040
Q2 2055	2055
Q3 2055	2070
Q4 2055	2085
Q1 2056	2100
Q2 2056	2115
Q3 2056	2130
Q4 2056	2145
Q1 2057	2160
Q2 2	

Have you sold any residential property during the year (not otherwise detailed on the information provided)?

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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?

- has it been used as your main home for the full time it has been owned? If not, please provide dates and details on the nature of the shared use.

7

\$

\$

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?

7

Yes ☐ No ☐

If yes, provide details of property: _____

Was the property empty for 62 days or more in the income year?

Yes ☐ No ☐

If yes, please complete the following section so we can determine the amount of allowable deductions.

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 income year

OR where income from any person received was less than 80% of market rate

* Associated persons include close relatives, or if owned by an entity, persons associated with the entity owning the property

If there is more than one tenant who used the property through the year, please attach details.

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Name of tenant:

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 exhaustive – details of all expenses will be required):

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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	\$
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Insurance \$

Repairs/maintenance for general wear and tear	\$
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Other (please give details) : _____

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