Individual Questionnaire – 31 March 2024

Ensure this questionnaire is completed and included with your records

Client Name:	Phone:	
IRD Number:	Email:	

To: Shore Chartered Accountants Limited

Terms of Engagement

I hereby instruct you and staff/contractors as applicable to prepare my Taxation Returns for the 2024 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:		
 Wages 		
 Termination or incentive payments 		
 ACC payments 		
 National Superannuation 		
 Any other benefits 		
In most cases IRD will have sent us these details direct, however we do need to check all details have been included.		
Student Loan		
Do you have a student loan?		
If so, please provide your latest statement from IRD		
Interest and Dividends	r	
Please supply the advice slips.		
 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 March 		
 If any dividends are taken as bonus shares, also include these advice slips 		

Rental Property Details				
Please provide us with the addresses of any rental prope	erties you have.	If a property was not rented for a full 12		
Address:			ths, please provide details of	why it was
Address:		vac	ant.	
Address:				
Autress				
Rental Income and Expenditure				✓
Please supply bank statements clearly identifying and de	etailing all transactions th	nat relat	e to the rental properties	
OR Please provide details of the following for each rental pro	operty. Use a separate s	heet if r	necessary.	
Income: Total Rent Received \$				
Expenses:				
•	Phone		¢	
Accounting fees \$			\$ ¢	
Advertising (to rent) \$ Bank fees \$	Power		\$ ¢	
· · · · · · · · · · · · · · · · · · ·	Rates (including regional co	uncil ro	Ψ tos)	
Insurance \$ Legal fees \$	Repairs and Maintena		\$	
Management fees \$	(please attach details			
Montgage Interest \$	Valuation fees	01 11100	\$	
(attach copy of loan summary/statements from bank)	Water rates		\$	
Details of any other expense relating to rental property:			Ψ	
		\$		
		\$		
Details of visits to inspect property/conduct property busi	iness:	·		
Date Details		Kilome	etres	
· · · · · · · · · · · _ · ·				
Residential Land Withholding Tax				
Have you sold residential property in New Zealand where	e 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 c	other sale and purchase			
documents.				
Desidential Drenate Cales				
Residential Property Sales				
Have you sold any residential property during the year (n the information provided)?	not otherwise detailed on			
If yes, when was the property purchased?				
If it was purchased with 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 owned? If not, please provide dates and details o shared use. 				
Mortgage Interest Paid on Residential Propertie	S			
Have you incurred interest on residential properties owner main family home or a 'new build*')? Is the interest also than residential rentals? If so, please provide details of a dates paid.	ed (which is not your against properties other			
* A new build is a self-contained residence that receives Certificate confirming the residence was added to the lar 2020				

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			
 Supply details of overseas interest, dividends, wages received, any other income, and taxation paid Provide details of any overseas investments held at any time during the financial year Attach all of your investments advisor's reports 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? 			
Any Other Income			
 Attach details: Income Replacement Insurance Policy – provide details of premiums and claims 			
 Look Through Company or Partnerships – if you have been allocated a share of income or 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. (e.g. Uber, Airbnb, services through platforms such as Pocket Job, Airtasker etc). 			
Donations			
Do you want us to complete your rebate claim form? Yes No If so, please attach receipts.			
Cryptoassets			
Have you received or traded in cryptoassets during the income year? If so, please provide the following information:			
The type of cryptoasset			
 For each transaction provide the date, type of transaction i.e. received or disposed of, number of units, value in NZD 			
 Total units of each cryptoasset held at the beginning and end of the year 			
Exchange records and bank statements			
Wallet addresses			

Mixed Use Holiday Home				
Do you have a property (such as a holiday home or a bach) that is used privately and a	lso to derive income ∖ Yes ⊔		
If yes, provide details of property:				
Was the property empty for 62 days or more in the income If yes, please complete the following section so we can det		Yes □ ble deductions.	No	
Mixed Use Holiday Home – Information Required				
The number of days the property was empty during the inco	ome year			
The number of days the asset was used by family or assoc OR where income from any person received was less than * Associated persons include close relatives, or if owned by an ent	80% of market rate		perty	
If there is more than one tenant who used the property thro	ough the year, please attach	details.		
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 required):	is not exhaustive – details o	of all expenses will b	e 🗌	
Cost of advertising for tenants		\$		
Cost of repairing damages caused by tenants		\$		
Number of days spent in the property while repairing dama	ges caused by tenants			
Mortgage interest		\$		
Rates		\$		
Insurance		\$		
Repairs/maintenance for general wear and tear		\$		
Other (please give details) :				
Working for Families Tax Credits and Parental Tax C Please supply full names and birth dates of all children. Ple				
following:				
 If you had a child born within the current financial year you the Parental Tax Credit. Please include their IRD Number not have this you will need to obtain one for them in orde entitlement for them Where a child has become financially independent during 	er below. If you do er to claim any			
year, please advise the date they left school or home				
Child's Name	<u>IRD No</u> .	Date of Birth	Date left School	

If you have received Working for Families Tax Credits during the year, please supply the certificate issued to you by IRD, detailing the amounts.		
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, please provide us with details of their income.		
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 your partner? If so, please provide details.		
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 Families Tax Credits		
You are required to supply details of income received from the following sources:		
 Salary exchanged for private use of a work 		
 Vouchers and other short-term charge facilities 		
 Major shareholder in a close company 		
 Non-locked-in PIE income 		
 Certain pensions and annuities 		
 Distributions from retirement savings schemes 		
 Distributions from superannuation schemes 		
 Tax-exempt overseas pensions 		
 Tax-exempt salary or wages 		
 Other income (if you or your partner get more than \$5000 per year to help with your living costs) 		
 Children's passive income 		
 Non-resident spouse or partner's income 		
 Non-beneficiary distributions from a trust 		
 Non-resident borrower's overseas income 		
 Losses 		
 Settlor's attributable trustee income 		
 Attributable fringe benefits 		
 Main income equalisation scheme deposits 		
 Main income equalisation scheme refunds 		
 Retirement savings schemes contributions 		
 Income from a retirement savings or superannuation scheme PIE 		
 Depreciation recovered on sale of a building 		
A detailed description and examples of above income types is available from the		
IRD website: https://www.ird.govt.nz/income-tax/income-tax-for-		
individuals/adjust-your-income/types-of-income		
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Thank you for completing this questionnaire Don't forget to sign it