



CANTERBURY
ACCOUNTANTS

Canterbury Accountants
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Trust Questionnaire 2024

For the year between 1 April 2023 to 31 March 2024

It is a requirement of Inland Revenue that this questionnaire be completed in full, signed and dated by the client.

Name:

Bank Account Number for Refund:

Inland Revenue no longer provides the option for refunds via cheque for any tax returns submitted for future income tax years. All tax refunds will now be paid by direct credit to the designated bank account. It is crucial that the bank account details Inland Revenue currently hold for you, if any, are correct.

Contact Details – to ensure our record is up to date	Preferred contact method
Email:	<input type="checkbox"/>
Phone Number:	<input type="checkbox"/>
Address:	<input type="checkbox"/>

Privacy Act Authorisation

- I/We authorise Canterbury Accountants & Taxation Specialists Ltd (Canterbury Accountants) and any employees or contractors of Canterbury Accountants to act as our tax agent with Inland Revenue on matters relating to ALL tax types. This includes authority to:
 - discuss and make enquiries verbally or in writing to Inland Revenue from time to time regarding my/our tax affairs
 - obtain and access information via telephone/info express, fax or online services provided by Inland Revenue.
- I/We authorise any person or company to provide Canterbury Accountants with such information as Canterbury Accountants may require to complete the Financial Statements, and/or Tax Return, and any other work Canterbury Accountants carries out on behalf of myself/ourselves.
- I/We further authorise Canterbury Accountants to furnish to any third party, financial information of mine/ours as Canterbury Accountants sees fit that is requested in furtherance of our business activities.
- I/We further authorise that all information is true and correct and is supplied under the terms pursuant to the signed terms of engagement previously issued.
- I/We authorise Canterbury Accountants to act on my/our behalf in respect of the Accident Compensation Corporation (ACC) for the purposes of querying and/or changing information on my/our ACC levy account(s) through ACC staff, and through ACC Online Services. This authority will also allow Canterbury Accountants' main representative discretion to delegate access to your ACC information to any member of Canterbury Accountants. Other delegated members of Canterbury Accountants will also be able to query and change information on your ACC levy account.

Signature: Date:

1. Interest (within NZ)	Yes	No
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Did the Trust receive any interest income?

If yes, please provide interest certificates (RWT certificates) supplied by your banks or investment providers.

2. Dividend (within NZ)	Yes	No
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Did the Trust receive any NZ sourced dividends during the year?

If yes, please provide dividend statements.

3. Portfolio investment entities (PIEs)	Yes	No
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Did the Trust have any investments in PIEs?

If yes, please attach any investment summary schedules received for the year including details of the Prescribed Investor Rate (PIR) used.

4. Overseas Income	Yes	No
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Did the Trust receive any income from overseas?

If yes, please indicate what types of income you have received and provide full details.

Interest/ Dividends/ Loyalties

Other overseas income, please specify.

5. Estate or Trust Income	Yes	No
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Did the Trust receive any income from an estate or a trust?

If yes, please provide full details if the accounts were not prepared by us.

6. Partnership	Yes	No
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Did the Trust receive any income from a partnership?

If yes, please provide full details if the accounts were not prepared by us.

7. Rental	Yes	No
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Does the Trust have any rental properties investment?

If yes, please complete a rental schedule.

8. Business	Yes	No
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Does the Trust have any business income?

If yes, please complete a Business Questionnaire

Were you allocated income/ loss from an LTC?

If yes, please provide full details if the accounts were not prepared by us.

9. Overseas holdings	Yes	No
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Does the Trust have any overseas holdings/ investments?

If yes, please provide full details of any holding in offshore entities, for example:

Superannuation schemes

Unit Trusts

Life insurance policies

Shares in overseas companies

Loans to foreign entities

Note: If you have offshore investments, you might be subject to foreign investment fund (FIF) rules.

10. Other income	Yes	No
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Did the Trust have any other income that is not mentioned above?

If yes, please provide full details. _____

11. Expenses	Yes	No
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Did the Trust borrow any money to invest in a business?

If yes, please provide full details.

Did the Trust have any other claimable expenses? For examples:

Management Fee

Accountancy Fee

Legal fee

Interest paid on funds borrowed

If yes, please provide full details.

12. Donations	Yes	No
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Did the Trust make any donations during the year?

If yes, please attach all receipts.

Note: You can claim a rebate for each of the following, as long as you donate or pay \$5 or more:

- donations to any IRD approved charitable (donee) organisations
- donations to any school (including schools for the disabled), to school Board of Trustees, or parent teacher associations. These payments must be donations, not payment of activity or stationery fees
- payment of state school fees, as long as these go to the school's general fund. You cannot claim fees for tuition, specific activities such as school trips, or attendance dues.

13. Other relevant information	Yes	No
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Does the Trust have any other information that you consider relevant?

If yes, please note below.

14. Trustee changes Yes No

Has there been a change in the trustees during the 2023/2024 year?

If yes, please provide full details.

15. Trustee details Yes No

Please list details of the current trustees

Name of Trustee	Email	Phone Number	Address

Disclosure of the trustee details to the beneficiaries is a requirement as a result of changes to the Trusts Act 2019 enacted from 1 April 2021.

Have you provided the above details of trustees and or any changes during the year to the beneficiaries?

16. Copy of the accounts Yes No

Do you require a copy of the accounts to be forwarded to a beneficiary?

If yes, please note their details below.

17. New obligations for trustees and rights for beneficiaries

Trustees and beneficiaries should familiarise themselves with their rights and obligations under the new Act. The changes include new trustee duties, documents the trustees must hold and disclosure of information with beneficiaries. Please get in contact with us if you have any questions or concerns.