



CANTERBURY
ACCOUNTANTS

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Personal Questionnaire 2020

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

Name:

Date of Birth:

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:	
Phone Number:	
Address:	

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. Wages /salaries, NZ Superannuation or WINZ income support	Yes	No
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Did you receive any of above income?

Did you receive any withholding income?

If yes, please complete business questionnaire.

2. Interest (within NZ)	Yes	No
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Did you receive any interest income?

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

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

If yes, please provide dividend statements.

4. Portfolio investment entities (PIEs)	Yes	No
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Did you 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.

5. Overseas Income	Yes	No
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Did you receive any income from overseas?

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

Salary/ Wages/ Pension/ Any other regular income

Interest/ Dividends/ Loyalties

Other overseas income, please specify.

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

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

7. Partnership	Yes	No
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Did you receive any income from a partnership?

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

8. Rental	Yes	No
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Do you have any rental properties investment, holiday home, boarders or home-stay students, flatmates or tenants? If yes, please complete a rental schedule.

9. Business	Yes	No
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Do you have any business/ self-employed income?

If yes, please complete a Business Questionnaire

Have you earned any salary from a company (with no PAYE deducted) in your capacity as a shareholder/director?

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

Were you allocated income/ loss from an LTC?

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

10. Overseas holdings	Yes	No
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Do you 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.

11. Other income	Yes	No
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Do you have any other income that is not mentioned above?

If yes, please provide full details.

12. Expenses	Yes	No
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Did you borrow any money to invest in a business and/or purchase shares?

If yes, please provide full details.

13. Income protection insurance	Yes	No
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Do you have any income protection insurance?

If yes, please attach receipts.

14. Working for family tax credit	Yes	No
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If you have any children under the age of 18 years who are still at school, you might be entitled to receive working for family tax credit. Inland Revenue will calculate your entitlement once you and your partner's personal tax returns are assessed. Should you have any questions, please feel free to contact

15. Donations	Yes	No
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Did you 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.

16. Change in income for the 2019/2020 tax year	Yes	No
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Has your income changed/ or will change for the coming year?

If yes, please advise us. This is particularly relevant to provisional tax payers.

17. Other relevant information

Yes

No

Do you have any other information that you consider relevant?

If yes, please note below.