

Individual Questionnaire – 2024

Ensure this questionnaire is completed and signed and provide with required information

Client Name:	
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To: **Peak Chartered Accountants Limited**

Terms of Engagement

I hereby instruct you **Peak Chartered Accountants Limited** 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 acknowledge that the terms and conditions apply as per our engagement letter with you.

Signature _____

Date _____

Please provide details of any changes to your circumstances during the year that may impact your tax return (including but not limited to employment, self-employment, permanently leaving or arriving in New Zealand, investments):

Records Required	✓	Comments
Wages/National Superannuation/Benefits		
I received tax deducted income (PAYE or withholding tax): In most cases IRD will have sent us these details direct, however we do need to check all details have been included. Please provide us with the names of any organisations you have received any income from including wages, honoraria, superannuation, ACC.	<input type="checkbox"/>	
Interest		
I received interest with RWT Deducted Please advise who you received this from and provide any notices or confirmations that you have received of the amounts.	<input type="checkbox"/>	
I received interest with no RWT Deducted Please advise who paid this to you and how much was received	<input type="checkbox"/>	
Dividends		
I received income from dividends Please provide dividend notices	<input type="checkbox"/>	

Overseas		
<p>I received overseas income</p> <p>Provide details of overseas interest, dividends, wages received, any other income, and taxation paid</p> <ul style="list-style-type: none"> Any overseas investments held at any time during the financial year Investments advisor's reports <p>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?</p> <p>Please provide details as these are potentially subject to tax under the foreign investment rules.</p>	<input type="checkbox"/> <input type="checkbox"/>	
Any Other Income		
<p>I received other income from an income replacement insurance policy</p> <p>Provide details of premiums and claims:</p> <p>I received income from a look through company, partnership or trust that you do not do the tax return for</p> <p>Please provide details</p> <p>I received income from somewhere else</p> <p>Provide details of other income (either taxable or non-taxable). This includes Uber, Airbnb, services through platforms such as Pocket Job, Airtasker etc</p>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	
Cryptoassets		
<p>I received income or traded in cryptoassets during the income year?</p> <p>Provide the type of cryptoasset</p> <ul style="list-style-type: none"> 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 	<input type="checkbox"/>	
Student Loan		
<p>Do you have a student loan?</p> <p>If so, please provide your latest statement from IRD</p>	<input type="checkbox"/>	
Rental and Leased Property		
<p>I have a rental property</p> <p>Please complete a rental property questionnaire.</p>	<input type="checkbox"/>	
Residential Property Sales		
<p>I sold residential property during the year (not otherwise detailed on the information provided) that was not used as my main home for the full time it was owned.</p> <p>If yes, when was the property purchased?</p> <p>If it was purchased within 10 years of the sale date,</p> <ul style="list-style-type: none"> what was the original purchase price and the sale price? <p>Provide dates and details on the nature of the shared use.</p>	<input type="checkbox"/>	<p>_____</p> <p>\$ _____</p> <p>\$ _____</p>

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.	<input type="checkbox"/>
Donations	
I paid donations and want you to complete my return Please provide receipts	<input type="checkbox"/>
Working for Families Tax Credits and Parental Tax Credit	
I received working for families tax credits and parental tax credits? Please ensure that IRD has the current and correct information for all children. Please advise of any income received not covered in this questionnaire that is incorporated into the IRD calculations Adjusting your income for Working for Families and student loans (ird.govt.nz)	<input type="checkbox"/>
Mixed Use Assets	
<p>I have a property (such as a holiday home or a bach) that is used privately and also to derive income?</p> <p>Provide details of the property:</p> <p>_____</p> <p>_____</p> <p>Was the property empty for 62 days or more in the income year? If yes, please complete the following section so we can determine the amount of allowable deductions.</p> <p><u>Information Required</u></p> <p>The number of days the property was empty during the income year _____</p> <p>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 _____</p> <p>* Associated persons include close relatives, or if owned by an entity, persons associated with the entity owning the property</p> <p>Did more than one tenant uses the property through the year _____</p> <p>Tenant Details: _____</p> <p>Relationship to owner (if any): _____</p> <p>Amount of rent they paid: \$ _____</p> <p>Dates rented (From: To) _____ TO _____</p> <p>Expenses incurred in respect of the property (the list below is not exhaustive – details of all expenses will be required):</p> <p>Cost of advertising for tenants \$ _____</p> <p>Cost of repairing damages caused by tenants \$ _____</p> <p>Number of days spent in the property while repairing damages caused by tenants _____</p> <p>Mortgage interest \$ _____</p> <p>Rates \$ _____</p> <p>Insurance \$ _____</p> <p>Repairs/maintenance for general wear and tear \$ _____</p> <p>Other (please give details) :</p>	<p style="text-align: center;"><input type="checkbox"/></p> <p style="text-align: center;"><input type="checkbox"/></p> <p style="text-align: center;"><input type="checkbox"/></p>

I have boat or plane (with a market value of \$50,000 or greater), that is used privately and also to derive income?

Description: _____

Market value: \$ _____

Was the asset unused for 62 days or more in the income year?

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

Information Required

The number of days the asset was **unused** 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

For non-associated persons where payment received is at least 80% of market value:

Number of days the asset was used: _____

Income received: \$ _____

Expenses incurred in respect of the property (the list below is not exhaustive – details of all expenses will be required):

Cost of advertising for hireage \$ _____

Cost of repairing damages caused by hireage \$ _____

Operating costs / supplies \$ _____

Insurance \$ _____

Repairs/maintenance for general wear and tear \$ _____

Other (please give details)