

Individual Questionnaire - 2025

ndividual Questionnaire – 2025				
nsure this questionnaire is completed and signed and provide with requir	ed inf	ormation		
Client Name:				
o: Peak Chartered Accountants Limited				
erms of Engagement				
hereby instruct you Peak Chartered Accountants Limited and staff/contractor eturns for the 2025 year. I undertake to supply all information necessary tesponsible for the accuracy and completeness of such information.	o carr	y out such services and will be		
uthority is given to obtain information from Inland Revenue, other government agous types (except child support), bank and loan accounts in order to complete btaining information through all Inland Revenue media and communication chann	the a	bove assignments. This includes		
acknowledge that the terms and conditions apply as per our engagement letter w	ith you	ı.		
ignature	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			
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.				
income from including wages, honoraria, superannuation, ACC.				
income from including wages, honoraria, superannuation, ACC. Interest				
Interest I received interest with RWT Deducted Please advise who you received this from and provide any notices or				
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.				
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. I received interest with no RWT Deducted				
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. I received interest with no RWT Deducted Please advise who paid this to you and how much was received				
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. I received interest with no RWT Deducted Please advise who paid this to you and how much was received Dividends				

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Overseas	ı	
I received overseas income		
Provide details of overseas interest, dividends, wages received, any other income, and taxation paid Any overseas investments held at any time during the financial year 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?		
Please provide details as these are potentially subject to tax under the foreign investment rules.		
Any Other Income	1	
I received other income from an income replacement insurance policy		
Provide details of premiums and claims:		
I received income from a look through company, partnership or trust that you do not do the tax return for		
Please provide details		
I received income from somewhere else Provide details of other income (either taxable or non-taxable). This includes Uber, Airbnb, services through platforms such as Pocket Job, Airtasker etc		
Cryptoassets		
I received income or traded in cryptoassets during the income year?		
Provide 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		
Student Loan		
Do you have a student loan?		
If so, please provide your latest statement from IRD		
Rental and Leased Property	1	
I have a rental property		
Please complete a rental property questionnaire.		
Residential Property Sales	1	T
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.		
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?		\$
Provide dates and details on the nature of the shared use.		

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Residential Land Withholding Tax	I	I		
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.				
Donations				
I paid donations and want you to complete my return	Ш			
Please provide receipts				
Working for Families Tax Credits and Parental Tax Credit	ı	I		
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 <u>Adjusting your income for Working for Families and student loans (ird.govt.nz)</u>				
Mixed Use Assets				
I have a property (such as a holiday home or a bach) that is used princome?	rivate	ely and also to derive		
Provide details of the property:				
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.				
Information Required				
The number of days the property was empty during the income year				
	. 41 1-			
The number of days the asset was used by family or associated persons* during 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 to the second seco				
Did more than one tenant uses the property through the year				
Tenant Details:				
Relationship to owner (if any):				
Amount of rent they paid: \$				
Dates rented (From: To)TO				
Expenses incurred in respect of the property (the list below is not exhaustive – d required):	etails	of all expenses will be		
Cost of advertising for tenants		\$		
Cost of repairing damages caused by tenants		\$		
Number of days apart in the property while repairing demages equaed by tenent	ło.			
Number of days spent in the property while repairing damages caused by tenant	15	<u> </u>		
Mortgage interest Rates		\$ \$		
		\$ \$		
Repairs/maintenance for general wear and tear \$ Other (please give details) :				
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I have boat or pl derive income?	ane (with a market va	llue of \$50,000 or greater),	that is used privately and also to	
Description: _				
Market value: \$				
	sed for 62 days or more in lete the following section	n the income year? so we can determine the amou	ınt of allowable deductions.	
Information Requi	<u>red</u>			
The number of days	rom any person received	amily or associated persons* d was less than 80% of market r	· ·	
For non-associated	persons where payment	received is at least 80% of ma	ket value:	
Number of days the	asset was used:			
Income received:		\$		
Expenses incurred required):	in respect of the property	(the list below is not exhaustiv	e – details of all expenses will be	
Cost of advertising	for hireage		\$	
Cost of repairing da	mages caused by hireag	е	\$	
Operating costs / su	upplies		\$	
Insurance			\$	
Repairs/maintenand	ce for general wear and to	ear	\$	
Other (please give	details)			

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