

Individual Questionnaire – 2025

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

Client Name:	
--------------	--

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 2025 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"/>	

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		
I have a property (such as a holiday home or a bach) that is used privately and also to derive income? Provide details of the property: <hr style="border: 0; border-top: 1px solid black; margin: 5px 0;"/> <hr style="border: 0; border-top: 1px solid black; margin: 5px 0;"/>		<input type="checkbox"/>
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.		<input type="checkbox"/>
<u>Information Required</u>		
The number of days the property was empty 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 _____ <small>* Associated persons include close relatives, or if owned by an entity, persons associated with the entity owning the property</small>		
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 _____		<input type="checkbox"/>
Expenses incurred in respect of the property (the list below is not exhaustive – details of all expenses will be required): Cost of advertising for tenants \$ _____ Cost of repairing damages caused by tenants \$ _____ Number of days spent in the property while repairing damages caused by tenants _____ Mortgage interest \$ _____ Rates \$ _____ Insurance \$ _____ Repairs/maintenance for general wear and tear \$ _____ Other (please give details) : _____		

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)