Individual Questionnaire – 2022





Client Name:		Pho	one:
IRD Number:		Мо	bile:
Balance Date:		Em	nail:
Terms of Engagement I hereby instruct you is 2022 year. I underta accuracy and complete Authority is given to oall tax types (except cobtaining information to I authorise your organisation to question and change information to other many other taxation returns I also accept that you accounts are due for present in accept that	Rodgers & Co Limited and staff/contractors as applicable ke to supply all information necessary to carry out such eness of such information. btain information from Inland Revenue, other government shild support), bank and loan accounts in order to complet hrough all Inland Revenue media and communication chains attention to act as my agent for ACC levy purposes for all as usery and change information on my ACC levy account(s) this will also allow your organisation's main representative numbers of your organisation. Other delegated members remation on my ACC levy account. The as my tax agent. All income tax returns will be signed arm on behalf of myself or any of my associated entities. That any collection costs you incur will be fully recoverable from the full of the	t agen ete the nnels i sociate hrough discre of you by me t the ra he cha om me	ces and will be responsible for the acies and financial institutions about above assignments. This includes including electronic ones. ed entities. This authorisation allows a ACC staff, and through MyACC for action to delegate access to my ACC aur organisation will also be able to however you are authorised to sign attention and that all arging of such interest will be at your example.
Signature	Date		
Records Requi	ired	✓	Comments
	uperannuation/Benefits	<u> </u>	1
Please provide us wit following from: Wages ACC payments National Superann Any other benefits	th the names of any organisations you have received the uation		
Student Loan		ı	
Do you have a stude	nt loan?		
	your latest statement from IRD		
Interest and Divid	ends		1
Please supply the ad			

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 For interest received, you should have an annual advice notice showing the withholding tax deducted. This may be on the bottom of your bank statement dated 31 March

• If any dividends are taken as bonus shares, also include these advice slips





Pontal and Lagged Proporty		
Rental and Leased Property		
Please complete attached rental questionnaire		
Mortgage Interest Paid on Residential Properties		
Have you incurred interest on residential properties owned (which is not your main family home)? Is the interest also against properties other than residential rentals? If so, please provide details of amount of interest and dates paid.		
Partnerships, Trusts, Estates and Companies		
Please supply details of income earned from any entity for which we do not prepare the accounts and tax returns.		
Overseas		
 Supply details of overseas interest, dividends, wages received, and taxation paid Provide details of any overseas investments held at any time during the financial year Attach all of your 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? 		
Any Other Income		
Attach details: Income Replacement Insurance Policy – provide details of premiums and claims Look Through Company – if you have been allocated a share of a loss other than from a company that we are aware of, please provide details Did you receive non-taxable income from any other sources? If Yes, please provide details.		
Donations		
Do you want us to complete your rebate claim form? Yes _ No _ If so, please attach receipts.		
Working for Families Tax Credits and Parental Tax Credit	_	
Please supply full names and birth dates of all children. Please note the following: If you had a child born within the current financial year you may be eligible for the Parental Tax Credit. Please include their IRD Number below. If you do not have this you will need to obtain one for them in order to claim any entitlement for them Where a child has become financially independent during the current financial year, please advise the date they left school or home		
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Child's Name	IRD No.		Date of Birth	Date left School
		_		
		_		
		_		
		_		
If you have received Working for Families Tax Credits during the supply the certificate issued to you by IRD, detailing the amount				
Also provide details of any child support or maintenance payme received.	nts made or			
If we do not prepare your spouse or partner's taxation return, pl	ease provide			
us with details of their income.				
Have there been any changes to your family circumstances, inc	luding a			
change in responsibility for your dependent child(ren), you have separated or otherwise changed your family circumstances? If provide details.	married,			
Do you share custody of your child(ren) with anyone other than If so, please provide details.	your partner?			
Did you work on average less than 20 hours per week if single of your spouse / partner combined work less than 30 hours per we please provide details.				
Additional income information - Working for Families	Tax Credits			
You are required to supply details of income received from the f sources:	ollowing			
Salary exchanged for private use of a work				
Vouchers and other short-term charge facilities				
Major shareholder in a close company		$H \perp$		
Non-locked-in PIE income		$H \perp$		
Certain pensions and annuities		HI		
Distributions from retirement savings schemes				
Distributions from superannuation schemes				
 Tax-exempt overseas pensions 				
Tax-exempt salary or wages		$H \perp$		
 Other income (if you or your partner get more than \$5000 pe with your living costs) 	r year to help			
Children's passive income				
Non-resident spouse or partner's income		닏ㅣ		
Non-beneficiary distributions from a trust				
Non-resident borrower's overseas income		HI		
■ Losses				
Settlor's attributable trustee income				
Attributable fringe benefits				
Main income equalisation scheme deposits		닏ㅣ		
Main income equalisation scheme refunds		$H \mid$		
Retirement savings schemes contributions	DIE			
 Income from a retirement savings or superannuation scheme 	PIF I	J		

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Depreciation recovered on sale of a building	
A detailed description and examples of above income types is available from the IRD website: https://www.ird.govt.nz/income-tax/income-tax-for-individuals/adjust-your-income/types-of-income	
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.	
Residential Property Sales	
Have you sold any residential property during the year (not otherwise detailed on the information provided)?	
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?	\$
 has it been used as your main home for the full time it has been owned? If not, please provide dates and details on the nature of the shared use. 	

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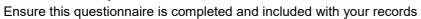




Mixed Use Holiday Home	
Do you have a property (such as a holiday home or a bach) that is used privately and als	o to derive income?
If yes, provide details of property:	
Was the property empty for 62 days or more in the income year? If yes, please complete the following section so we can determine the amount of allowab	Yes ☐ No ☐ le deductions.
Mixed Use Holiday Home - Information Required	
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 inco 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 e	
If there is more than one tenant who used the property through the year, please attach do	etails.
Name of tenant:	
Relationship to owner (if any):	
Amount of rent they paid: \$	
Dates rented (From: To)	
Expenses incurred in respect of the property (the list below is not exhaustive – details of required):	all expenses will be
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) :	

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Mixed Use Boat or Plane			
Do you have a boat or plane (with a	market value of \$50,000 or greater), that is	used privately and also to derive	
income?		Yes 🗌 No 🗌	
If yes, provide details:			
Description:			
Market value: \$	_		
Was the asset unused for 62 days o If yes, please complete the following	r more in the income year? section so we can determine the amount o	Yes ☐ No ☐ f allowable deductions.	
Mixed Use Boat or Plane - Info	ormation Required		
The number of days the asset was u	inused during the income year		
The number of days the asset was u	ısed by family or associated persons* durinç	g the income year	
OR where income from any person in * Associated persons include close relati	received was less than 80% of market rate ves, or if owned by an entity, persons associated	with the entity owning the property	
For non-associated persons where p	payment received is at least 80% of market	value:	
Number of days the asset was used	:		
Income received:	\$		
Expenses incurred in respect of the required):	property (the list below is not exhaustive – c	details of all expenses will be	
Cost of advertising for hireage		\$	
Cost of repairing damages caused b	y hireage	\$	
Operating costs / supplies		\$	
Insurance		\$	
Repairs/maintenance for general we	ar and tear	\$	
Other (please give details)			
Cryptoassets			
Have you received or traded in crypt please provide the following informa	toassets during the income year? If so, tion:		
The type of cryptoasset			
For each transaction provice or disposed of, number of to the second secon	le the date, type of transaction i.e. received units, value in NZD		
Total units of each cryptoas year	sset held at the beginning and end of the		
Exchange records and ban	k statements		
Wallet addresses			

Thank you for completing this questionnaire Don't forget to sign it

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