Ensure this questionnaire is completed and included with your records

Client Name	Phone:
Address	
Email:	Preferred questionnaire format:
	🗌 Paper 📋 Email 🔲 E-document

Records Required		Comments
Wages/National Superannuation/Benefits		
 Please provide us with the names of any organisations you have received the following from: Wages ACC payments National Superannuation Any other benefits In most cases IRD will have sent us these details direct, however we do need to check all details have been included. 		
Student Loan		
Do you have a student loan?		
If so, please provide your latest statement from IRD		
Interest and Dividends		
Please supply the advice slips.		
 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 		
Rental and Leased Property		
Please complete attached rental questionnaire		
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		
Include overseas interest, dividends, wages received and taxation paid. Note: New Zealand residents are liable for tax on all world-wide income.		
If Yes, please provide details of the value and quantity of the investments held at any time during the financial year. Please provide the date, value and details of any purchases, sales and income (dividends).		
Do you have rights in a Foreign Superannuation or Life Insurance Policy? If yes, please provide all details.		
Please attach all of your investments advisor's reports. This information is required so we can calculate if any income needs to be declared under the FIF (Foreign Investment Fund) rules.		

Records Required	✓	·	Comments	
Insurance				
Income Replacement Insurance Policy – provide details of: Premiums paid during the year Any claims				
Any Other Income				
 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 				
 Crypto Assets – Do you have a bitcoin account, NFTs, or any other forms of Crypto assets?]		
Donations				
Do you want us to complete your rebate claim form? Yes No No If so, please attach receipts. PLEASE NOTE: The rest of this questionnaire is applicable only to				
families that claim Working for Family Tax and Parenta Credits. Please ignore pages 3 and 4 if you do not clai				
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 				
Child's Name	<u>RD No</u> .		Date of Birth	Date left School

Records Required	✓	Comments
Working for Families Tax Credits and Parental Tax Credit (continued)		
If you have received Working for Families Tax Credits during the year, please		
supply the certificate issued to you by IRD, detailing the amounts. Also provide details of any child support or maintenance payments made or		
received. If we do not prepare your spouse or partner's taxation return, please provide us		
with details of their income.		
Have there been any changes to your family circumstances, including a change in responsibility for your dependent child(ren), you have married, separated or otherwise changed your family circumstances? If so, please provide details.		
Do you share custody of your child(ren) with anyone other than your partner? If so, please provide details.		
Did you work on average less than 20 hours per week if single or did you and your spouse / partner combined work less than 30 hours per week? If so, please provide details.		
Additional income information - Working for Families Tax Credits		
For the year starting 1 April 2011 the definition of family income for Working for Families Tax Credits has been extended. You are now required to supply details of income received from the following sources:		
• Attributable trustee income Attributable trustee income is all income for the year of a trust that hasn't been distributed as beneficiary income. Trustee income will be attributed only to settlors of a trust. The settlors are individuals who establish or contribute funds to the trust.		
• Attributable fringe benefits If you receive fringe benefits and you or your associates (e.g. the family trust) are shareholder-employees of the company you work for and you or your associates hold voting interests of 50% or more then you need to include the fringe benefits in your family income. The value of the fringe benefit is the tax- inclusive value of the benefit.		
• PIE income This includes an amount of income attributed by a portfolio investment entity (PIE) to the principal caregiver or their spouse or partner, except if the PIE is a superannuation fund or a retirement savings scheme (e.g. KiwiSaver).		
 Passive income of children This includes all passive income such as interest, rents or beneficiary income, received by a dependent child above a threshold of \$500 per year, per child. 		
 Income of non-resident spouse If your spouse or partner, who is not a tax resident, is earning an income overseas, from 1 April 2011 you will need to include their worldwide income as part of your family income. 		
• Tax exempt salary or wages This includes salary and wages that are exempt from income tax under specific international agreements in New Zealand. (e.g. employees of international organisations such as the United Nations or the Organisation for Economic Co- operation and Development (OECD).		
 Pensions and annuities This includes 50% of the amount of pension or annuity payments from life insurance policies or a superannuation fund, (excluding NZ Super). 		

Records Required	✓	Comments		
Additional income information - Working for Families Tax Credits (continued)				
• Other payments These are payments from any other person or entities that are used for the family's day-to-day living expenses. If the total amount is more than \$5,000 for the tax year, then the total amount must be included as family income.				
 Income equalisation scheme deposits (excludes 'adverse events' deposits) This includes any deposits made by you, a company controlled by you or your trust to an agricultural, fishing or forestry business income equalisation scheme account at Inland Revenue. 				
A detailed description and examples of above income types is available from the IRD website: <u>http://www.ird.govt.nz/wff-tax-credits/entitlement/work-out/wfftc-entitlement-adjustments.html</u>				

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

To: WestNet Tax Accounting Limited

Terms of Engagement

I hereby instruct you to prepare our Taxation Returns for the 2023 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. If any part of this document is not completed, WestNet Tax Accounting Ltd will assume that the required figure is nil or this question does not apply to my/our accounts. You are hereby authorised to communicate with my bankers, solicitors, finance companies and all government agencies to obtain such information as you require in order to carry out the above assignments.

You are to represent me/us as my/our tax agent. All income tax returns will be signed by me/us however you are authorised to sign any other taxation return on behalf of myself/ourselves or any of my/our associated entities.

I/We also accept that all WestNet Tax Accounting Limited's accounts are due for payment within 10 working days following invoice date unless a prior arrangement exists. I/We accept that any collection costs you incur will be fully recoverable from me/us.

Signature _____

Date _____