



## Individual Tax Return Questionnaire

(No Sole-Trader Business Activity)

Year End 31<sup>st</sup> March 2024

**Full Name:**

**IRD Number:**

### Contact Details

Physical Address:

Delivery Address (if different from above):

Email:

Phone:

What is your preferred method of contact?

# Individual Tax Return Checklist

## Income

Please tick sources of income which apply

- Income with PAYE Deducted - Salary & wages, ACC or NZSuper
- MSD Grants including COVID wage subsidies
- Family Support
- NZ Interest with RWT Deducted
- NZ Dividends
- Partnership Income or loss
- Trust Income

**Please provide copies of income documentation for the following items if they apply to you:**

- Power Dividend - If yes, please confirm amount received and provide dividend statement
- Rental or Airbnb Income or loss - If yes, please provide details and complete the rental or Airbnb checklist
- Overseas Income - includes pensions, interest & dividends  
If yes, please provide summaries confirming amounts received
- Taxable income from Maori Authority distribution
- Self employed income or scheduler income - if yes, please provide details and complete the business checklist
- Any other income including interest from private loan agreements, sale of land, buildings, shares or securities - if yes, please provide details

**Do you have any other information that you consider relevant to your income?**

## Your Expenses

- Are any losses available from a prior period or other entity?
- If you have received income from schedular payments, do you have any expenses to claim? - *If yes, please request & complete business checklist from our Receptionist*
- If you have self-employed income, do you have any expenses to claim? - *If yes, please complete business checklist*
- Did you pay income protection insurance? - *If yes, please provide copy of invoice for premiums*
- Did you make donations to registered charities over \$5? - *If yes, please provide copy of receipt*

**Do you have any other information that you consider relevant to your expenses?**

## Other Information

- Are you considered a tax resident of another country?
- Has your income changed significantly or will it be likely to change in the coming year?  
  
*If your income has changed significantly this may affect your working for families and/or provisional tax calculations*
- Do you have tax arrears, or are you expecting challenges in paying taxes in the future?

**Are you expecting any of the following events in the coming year which may require your tax returns to be completed by a certain date?**

- Business or personal loan refinance
- Applying for a business or personal mortgage, loan or hire purchase
- Buying or selling a property
- Are you expecting a refund or adjustment to provisional tax calculations, or working for families.
- Is a dependant likely to be applying for a student allowance

## Important things to remember

We will not begin working on your Tax Returns until **ALL THE INFORMATION** in these worksheets have been filled out entirely despite how well we know you and your circumstances.

Please provide copies of the requested documents and ensure you keep the originals. You are required to keep these records for a minimum of seven years.

All information and worksheets can be emailed to:

**reception@borriegrup.co.nz**

or delivered to:

**1017 Heretaunga Street East, Parkvale, Hastings 4122**

## **Privacy Act Authorisation**

I instruct Borrie Financial Group Limited to prepare my financial statements and tax return(s) for the year ended specified on page one. I undertake to supply all information necessary for this engagement and to be responsible for the accuracy and completeness of such information.

I understand that I am required to keep all tax records including receipts, vehicle logs and home office workings for a period of seven years. I will retain the original of all records provided to Borrie Financial Group for this period and will not require records to be returned to me.

I understand that the financial statements (if required) are to be prepared for taxation purposes (to determine my tax liabilities) only.

### **Authorisation to obtain information subject to the Privacy Act**

I authorise Borrie Financial Group Limited to communicate with the IRD, ACC, appropriate bankers, solicitors, finance companies and other persons or organisations to obtain such further information as is required to carry out the above engagement. This authorisation will stay in place until cancelled by either party in writing.

**The information that I have provided in this questionnaire and checklist and any other source is true and correct.**

Name:

Signature: \_\_\_\_\_

Date: