



# 2019 ANNUAL INDIVIDUAL TAX QUESTIONNAIRE

Client Name: \_\_\_\_\_  
Postal Address: \_\_\_\_\_  
Physical Address: \_\_\_\_\_  
Business Phone: \_\_\_\_\_  
Home Phone: \_\_\_\_\_  
Mobile Phone: \_\_\_\_\_  
Email: \_\_\_\_\_

Please complete this questionnaire as it contains vital information required to complete your tax return. Be sure to answer all questions so we know you have not missed any questions by mistake. Correctly completing this questionnaire will generally save us a great deal of time which will ensure your statutory obligations are met and you receive vital information on the performance of your business in a timely fashion.

## TERMS OF ENGAGEMENT

I instruct BDO Invercargill to prepare my financial statements and taxation returns for the 2019 year. BDO Invercargill is authorised to act as my tax agent and communicate with, and obtain information from Inland Revenue on my behalf in respect of all revenue/tax types.

I accept the responsibility for the accuracy and completeness of the information supplied and is to be used in the preparation of my financial statements and income tax returns. You are not to complete an audit, nor do I wish you to undertake a detailed review of my affairs in order to substantiate the accuracy of the information, and therefore you are unable to provide any assurance on my financial statements. I understand your work can not be relied on to detect error or fraud and that you accept no liability for the accuracy and the completeness of the information supplied by me. I further understand that the financial statements will be prepared at my request and for my purpose only and that you will not be liable for any losses, claims or demands by any third person.

I accept responsibility for any failure by me to supply all relevant records and information to you. You are authorised to communicate with the appropriate bankers, solicitors, finance companies, ACC and other persons or organisations to obtain such further information as you may require in order to carry out the above assignment.

Client Name: \_\_\_\_\_  
Signed: \_\_\_\_\_  
Date: \_\_\_\_\_

# RECORDS REQUIRED BY BDO INVERCARGILL

Please do not hesitate to contact us on 03 218 2959 should you require assistance to complete.

Please ensure that the following details are provided for all taxpayers you wish us to prepare tax returns for (including spouse and children) - if necessary phone us and we will send additional forms.

## 1. INCOME/INFORMATION TO BE SUPPLIED

Please answer all questions even though some may not apply to you. In preparing your tax return we rely on the accuracy of the information you supply. BDO accepts no responsibility for the accuracy of the information provided to us. We will contact you should we need to clarify any matter or require further information. Significant penalties may be incurred for the filing of false or misleading tax returns. If you are unsure about any matter please contact us.

**IN ALL CASES (WHERE APPLICABLE) PLEASE PROVIDE DETAILS.**

Please attach all relevant information and return to us along with this signed questionnaire.

Tick where appropriate ✓

- Did you earn income from salary/wages or schedular payments?
- Did you earn self-employed income during the year?
- Did you earn New Zealand interest income or receive an interest certificate?
- Did you earn New Zealand dividend income or bonus share issues and receive dividend statements?
- Did you at any time during the year have an investment in a PIE?
- Did you at any time during the year have an investment in a managed fund or through an investment broker?
- Did you receive any trust or estate distributions during the year?
- Rental Property Income and Expenses - Appendix 1
- Did you receive any other income during the year?
- Did you have any taxable property sales or gains from share sales (If you deal in shares)
- Did you have any income/loss from a partnership?
- Were you allocated any income/expenditure from a Look Through Company ("LTC")?
- Were you allocated a shareholder-employee salary?
- Did you make any charitable or school donations of \$5 or more?  
We need receipts for all donations to be able to claim the rebate.
- Do you have income protection insurance?

## 2. STUDENT LOAN AND WORKING FOR FAMILIES

Do you have a student loan? Yes          No

You may be entitled to Working for Families Tax Credits depending on the joint income of the principal caregiver and spouse. Do you have children who are school age or younger? Yes          No

Please provide names, IRD numbers for all children. If any of your children left school during the year, please advise the date:

Children's Name(s)	Date of Birth	IRD No:	Date Left School

If BDO does not compile the income tax return for your partner, please provide us with confirmation of all earnings.

Do you have any shared care arrangements in place? Yes          No

If yes, please provide further details.

Do you receive or pay any child maintenance? Yes          No

If yes, please provide details of how much was paid or received during the year          \$ \_\_\_\_\_

Did you receive any of the following: Yes          No

- Attributable trustee income
- Attributable fringe benefits
- PIE income
- Passive income of children
- Income of a non-resident spouse
- Tax exempt salary or wages
- Pensions and annuities
- Other payments
- Income equalisation scheme deposits
- Salary or wages exchanged for private use of an employer-provided motor vehicle
- A short-term charge facility (including vouchers) to purchase goods and services that your employer pays for

If yes, please provide further information.

## 3. OTHER

Any other information you may find relevant.

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## 4. TAX REFUNDS

If you qualify for an income tax refund, please indicate how it is to be used.

Refund to a Bank Account

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Code	Branch	Account Number	Suffix
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Name of Account

OR

Offset Provisional Tax Liability (if any)          OR           Transfer to a Related Person's Tax Liability

## APPENDIX 1 - RENTAL INFORMATION

Address of Property \_\_\_\_\_

Did you make any improvements to the property during the year?

If 'yes', please advise the cost and nature of the improvements.

How many days was the property rented out to non-associated people? \_\_\_\_\_

How many days was the property rented to, or used by, associated people, e.g. family? \_\_\_\_\_

How many days was the property used personally? \_\_\_\_\_

Please provide the entire year's rental information for the following:

- Bank Statements
- Loan Statements
- Income, Commission, Rates, Insurance, Repairs & Maintenance, Bank charges, Other expenses

\*Provide a separate list and invoices of all repairs costing more than \$500.

\*If the property is independently managed please provide either monthly rental a copy of the manager's financial reports which were supplied.

Was a property purchased or sold during the financial year? If so, please provide the following:

- Solicitor's settlement statement confirming purchase details of property.
- The rateable valuation or independent valuation of the property at the time of purchase.
- Advise how the property was funded and any loan documentation.
- A list of chattels in the property at time of purchase.