

Personal Questionnaire – Year Ended 31 March 2018

Name: _____	
Authorisation	
I instruct Smart Tax Solutions Limited to prepare my income tax return for the 2018 year. I undertake to supply all information required for this engagement and accept responsibility for the accuracy and completeness of such information. I acknowledge that no audit or review engagement will be performed and accordingly no assurance will be expressed on the tax returns, summary or related schedules.	
I authorise Smart Tax Solutions Limited to obtain any additional information required for the preparation of my taxation returns from my Solicitors, Banks, Government agencies and financial organisations.	
Signature _____	Date _____
Phone: _____	Fax: _____
Email: _____	

INFORMATION REQUIRED

Please complete this questionnaire carefully. The provision of complete information will assist us in doing your work more efficiently. Please tick the boxes in each section if they are applicable to you. If any section is not applicable, please write N/A in the box.

1. Earnings from Employment National Superannuation and Scheduling Income Subject to	<input type="checkbox"/>
This information is available to us from Inland Revenue provided you have authorised us to act as your tax agent	
Did your earnings during the year included a redundancy payment? If so, please provide details of any redundancy tax credit claimed.	Yes / No
2. NZ Investment Income	<input type="checkbox"/>
Please supply copies of all certificates for interest & notices for dividends received during the year	
Did you buy or sell any shares during the year? If so, please provide details.	Yes / No
Did you invest in any NZ Portfolio Investment Entities (PIES) during the year? If so, please provide details & copies of distribution summaries for the year.	Yes / No
Did you purchase or sell any 'financial arrangements' (e.g. corporate bonds & capital notes government & local body stock, futures, commercial bills, etc) during the year? If so, please provide details.	Yes / No

3. Overseas income

Did you have any overseas investments during the year?

Yes / No

If so, please provide details.

Did you hold any rights or an interest or shares in a foreign company, unit trust superannuation scheme or life policy at any time during the year?

Yes / No

Did you have any bank accounts denominated in a foreign currency or any other off-shore investments? If so, please provide details.

Yes / No

4. Rental Income

If you received income from the rental or lease of property please complete a Rental income schedule

5. Business Income

If you received any income from a business you operate in your own name please complete a Business Checklist.

6. Company, Trust, Estate, or Other Income

Please attach full details of any other income you received (e.g. business/partnership/trust/estate income, company shareholder/employee salary, overseas income, pensions, income protection insurance, royalties, income from share or property dealing, taxable Maori authority distribution)

7. Look-through Company Losses (LTC)

Name of Company

Share of Net Loss

\$ _____

\$ _____

8. Expenses

Please attach full details of any expenses incurred in earning income (e.g. Income protection insurance, ACC levies, interest on loan borrowed for investment, etc.)

9. Donations Tax Credit & Childcare/Housekeeper Rebate

If you would like us to complete these claims please provide all receipts.

Did you make any donations via Payroll giving during the year?

10. Loan

Did you borrow any funds to invest during the year?

If so, please provide details.

11. Working for Families Tax Credits

If you or your partner started or stopped receiving Working for Families assistance during the year for any children please advise:

Name of Child	IRD Number	Date of Birth	Date left school
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____