PKF Francis Aickin Limited
Chartered accountants and business advisers

Passion | Teamwork | Clarity | Quality | Integrity

Individual Annual Questionnaire B 2020

Client Name: _____

I authorise you to prepare my tax return from the information and records I have supplied to you. I accept responsibility for the accuracy and completeness of all records and information supplied to you. You are authorised to communicate with my/our bankers, solicitors, finance companies and any other business that I/we deal with to obtain such information as you require to complete the above duties.

Signature: _____ Date: _____ Phone:_____ Email: _____

Bank account for tax refund: Name: _____ Account no: _____

Information required to complete your tax return:

		TICK	
1.	Did you receive income from **wages / salaries / national superannuation / WINZ / ACC payments** or income from **employment with withholding tax deducted**?	Yes	No
2.	Have you received any **interest or dividend** income? *If yes, please attach interest and dividend certificates.*	Yes	No
3.	Did you have an interest in, or receive any income from: - An estate or trust? Name: - Partnership? Name: - Company? Name:	Yes	No
4.	Did you receive any **rent from properties**? *If yes, please complete separate Rental Questionnaire.*	Yes	No
5.	Do you have a property (such as a **holiday home**), **a boat or a plane** (with a market value of $50,000 or greater) that is used privately and to derive income?	Yes	No
6.	**Bright-line Test for Sale of Residential Property** Have you purchased and sold a residential property since 1 October 2015 which is not your main residence?	Yes	No
7.	Do you have any **overseas** bank accounts, or any interest in overseas companies, unit trusts, life assurance policies or superannuation funds, or receive any other form of overseas income?	Yes	No
	Do you own any **overseas** property or have borrowed funds from overseas? *If yes to either of these, please request a separate Overseas Income Questionnaire or download from our website.*	Yes	No
	Have you arrived in / returned to NZ in the last 5 years? Please enter your date of arrival: ___ /___ /_____	Yes	No
8.	Did you receive **any other income** from any other source?	Yes	No
9.	**Working for Families**: were you a caregiver for a child under 19 years of age during the year?	Yes	No
10.	Did you pay premiums **for income protection insurance**? *If yes, please attach a copy of the confirmation letter from your insurer showing the premiums paid and any claims.*	Yes	No
11.	Do you have **a student loan**?	Yes	No
12.	Are you in **Kiwisaver**? *If yes, please provide evidence to confirm your PIR rate.*	Yes	No
13.	Did you make any **donations**? *If yes, do you want us to complete your rebate claim form? Please attach receipts.*	Yes	No

OTHER INFORMATION

If you have any other information, which you feel may be relevant to, or included in your tax return that has not been included in the above questions, please attach full details. i.e. any significant changes in your business, wealth or income.

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