

**PKF****PKF Francis Aickin Limited**
Chartered accountants and business advisers

Passion

Teamwork

Clarity

Quality

Integrity

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 ? | <table border="1" style="border-collapse: collapse;"> <tr> <td style="padding: 2px 10px;">Yes</td> <td style="padding: 2px 10px;">No</td> </tr> </table> | Yes | No | | | | |
| Yes | No | | | | | | |
| 2. Have you received any interest or dividend income? <i>If yes, please attach interest and dividend certificates.</i> | <table border="1" style="border-collapse: collapse;"> <tr> <td style="padding: 2px 10px;">Yes</td> <td style="padding: 2px 10px;">No</td> </tr> </table> | Yes | No | | | | |
| Yes | No | | | | | | |
| 3. Did you have an interest in, or receive any income from: | <table border="1" style="border-collapse: collapse;"> <tr> <td style="padding: 2px 10px;">Yes</td> <td style="padding: 2px 10px;">No</td> </tr> </table> | Yes | No | | | | |
| Yes | No | | | | | | |
| <ul style="list-style-type: none"> - An estate or trust? Name: _____ - Partnership? Name: _____ - Company? Name: _____ | | | | | | | |
| 4. Did you receive any rent from properties ? <i>If yes, please complete separate Rental Questionnaire.</i> | <table border="1" style="border-collapse: collapse;"> <tr> <td style="padding: 2px 10px;">Yes</td> <td style="padding: 2px 10px;">No</td> </tr> </table> | Yes | No | | | | |
| 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? | <table border="1" style="border-collapse: collapse;"> <tr> <td style="padding: 2px 10px;">Yes</td> <td style="padding: 2px 10px;">No</td> </tr> </table> | Yes | No | | | | |
| 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? | <table border="1" style="border-collapse: collapse;"> <tr> <td style="padding: 2px 10px;">Yes</td> <td style="padding: 2px 10px;">No</td> </tr> </table> | Yes | No | | | | |
| 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?
Do you own any overseas property or have borrowed funds from overseas? <i>If yes to either of these, please request a separate Overseas Income Questionnaire or download from our website.</i>
Have you arrived in / returned to NZ in the last 5 years? Please enter your date of arrival: ___ / ___ / ___ | <table border="1" style="border-collapse: collapse; margin-bottom: 5px;"> <tr> <td style="padding: 2px 10px;">Yes</td> <td style="padding: 2px 10px;">No</td> </tr> </table> <table border="1" style="border-collapse: collapse; margin-bottom: 5px;"> <tr> <td style="padding: 2px 10px;">Yes</td> <td style="padding: 2px 10px;">No</td> </tr> </table> <table border="1" style="border-collapse: collapse;"> <tr> <td style="padding: 2px 10px;">Yes</td> <td style="padding: 2px 10px;">No</td> </tr> </table> | Yes | No | Yes | No | Yes | No |
| Yes | No | | | | | | |
| Yes | No | | | | | | |
| Yes | No | | | | | | |
| 8. Did you receive any other income from any other source? | <table border="1" style="border-collapse: collapse;"> <tr> <td style="padding: 2px 10px;">Yes</td> <td style="padding: 2px 10px;">No</td> </tr> </table> | Yes | No | | | | |
| Yes | No | | | | | | |
| 9. Working for Families: were you a caregiver for a child under 19 years of age during the year? | <table border="1" style="border-collapse: collapse;"> <tr> <td style="padding: 2px 10px;">Yes</td> <td style="padding: 2px 10px;">No</td> </tr> </table> | Yes | No | | | | |
| Yes | No | | | | | | |
| 10. Did you pay premiums for income protection insurance ? <i>If yes, please attach a copy of the confirmation letter from your insurer showing the premiums paid and any claims.</i> | <table border="1" style="border-collapse: collapse;"> <tr> <td style="padding: 2px 10px;">Yes</td> <td style="padding: 2px 10px;">No</td> </tr> </table> | Yes | No | | | | |
| Yes | No | | | | | | |
| 11. Do you have a student loan ? | <table border="1" style="border-collapse: collapse;"> <tr> <td style="padding: 2px 10px;">Yes</td> <td style="padding: 2px 10px;">No</td> </tr> </table> | Yes | No | | | | |
| Yes | No | | | | | | |
| 12. Are you in Kiwisaver ? <i>If yes, please provide evidence to confirm your PIR rate.</i> | <table border="1" style="border-collapse: collapse;"> <tr> <td style="padding: 2px 10px;">Yes</td> <td style="padding: 2px 10px;">No</td> </tr> </table> | Yes | No | | | | |
| Yes | No | | | | | | |
| 13. Did you make any donations ? <i>If yes, do you want us to complete your rebate claim form? Please attach receipts.</i> | <table border="1" style="border-collapse: collapse;"> <tr> <td style="padding: 2px 10px;">Yes</td> <td style="padding: 2px 10px;">No</td> </tr> </table> | Yes | No | | | | |
| 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.