PKF 2024 INDIVIDUAL INFORMATION QUESTIONNAIRE

Name			
Street Address			
Telephone (home)			
Telephone (business)			
Telephone (mobile)			
Email			
Convenient time to call			
Additional Family Mombor	Dotails		
Additional Family Member Name	Date of Birth	IRD Number	Student Loan?
			0.0000111
answer all questions so questionnaire will general	we know you have not mis ly save us a great deal of tim	sed any questions by mista	lete your accounts. Be sure to ke. Correctly completing this utory obligations are met and n.
	TERMS OF TH	IE ENGAGEMENT	
(The complete Terms of En	gagement are set out in our E	ngagement Letter)	
I hereby instruct PKF Hamil	ton Limited to prepare my Fir	nancial Accounts and Taxation	Returns for the 2024 year.
	thorised to act as my tax agenespect of all revenue/tax types		bbtain information from Inland
the preparation of my fina you to undertake a detaile are unable to provide any a error or fraud and that you me. I further understand the	ncial statements and income d review of my affairs to subs assurance on my financial state a accept no liability for the ac	tax returns. You are not to co stantiate the accuracy of the in ements. I understand your wor curacy and the completeness vill be prepared at my request	ed above which is to be used in mplete an audit, nor do I wish nformation, and therefore you k cannot be relied on to detect of the information supplied by and for my purposes only and
authorised to communica	te with the appropriate Bar		nation to you. You are hereby panies and other persons or bove assignment.
Client Name:			
Signed:			
Date:			

1. New Zealand Income

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. PKF Hamilton 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.

- a) Did you earn income from salary/wages or schedular payments If yes, please attach earnings information, if provided by your employer
- b) Did you earn New Zealand interest income? If yes, attach tax certificates from the bank/borrower that confirms the interest earned and any resident withholding tax deducted.
- c) Did you earn New Zealand dividend income or bonus share issues? *If yes, attach shareholder dividend statements for each dividend.*
- d) Did you at any time during the year have an investment in a PIE? *If yes, please provide details*
- e) Did you at any time during the year have an investment in a managed fund or through an investment broker?

 If yes, please provide all investment reports.
- f) Did you receive any trust or estate distributions during the year? *If yes, give details (trust/estate name, amount and date).*
- g) Did you earn self-employed income during the year? *If yes, please complete the Business Information Questionnaire*
- h) Did you have a rental property? E.g. Residential, Commercial or Mixed-Use Asset. *If yes, please complete the Rental Information Questionnaire*
- i) Did you receive any farming income?

 If yes, please complete the Additional Information from Farmers

 Questionnaire
- j) Did you have any income/loss from a partnership? *If yes, please provide details*
- k) Were you allocated any income/expenditure from a Look Through Company ("LTC")?

 If yes, please provide details.
- I) Were you allocated a shareholder-employee salary? If yes, please provide details
- m) Did you receive any other taxable income or taxable loss during the year? (e.g. taxable property sales or share sale gains/losses if you deal in shares)? If unsure, please ask your PKF Hamilton advisor
- n) Do you have a student loan?

Please CIRCLE the correct answer		
No		

2. Overseas Income At any time during the financial year, did you: a) Own any shares in overseas companies or unit trusts? b) Have any interest in an overseas superannuation scheme? c) Have any interest in an overseas life insurance policy? If yes, please attach all documentation received for these investments, including the market value of these investments as at balance date. At any time during the financial year, did you: d) Do you have any foreign currency bank accounts (in New Zealand or overseas)? e) Do you have any deposit accounts, loans, bonds, or other similar investments? If yes, please provide details of these investments (e.g. monthly bank statements) confirming all interest received, and foreign taxes paid or deducted. At any time during the financial year, did you receive any overseas income of the following types: f) Rents p) Trust/Estate Distributions p) Trust/Estate Distributions h) Foreign pensions / annuities yes No If yes, please provide details of income and foreign taxes paid or deducted.	Further details on anything marked as 'Yes' on Page 2		
At any time during the financial year, did you: a) Own any shares in overseas companies or unit trusts? b) Have any interest in an overseas superannuation scheme? c) Have any interest in an overseas life insurance policy? Yes No If yes, please attach all documentation received for these investments, including the market value of these investments as at balance date. At any time during the financial year, did you: d) Do you have any foreign currency bank accounts (in New Zealand or overseas)? e) Do you have any deposit accounts, loans, bonds, or other similar investments? If yes, please provide details of these investments (e.g. monthly bank statements) confirming all interest received, and foreign taxes paid or deducted. At any time during the financial year, did you receive any overseas income of the following types: f) Rents Yes No Please CIRCLE the correct answer of the following types: f) Rents Yes No Please CIRCLE the correct answer of the following types: f) Rents Yes No Other (please pecify) Yes No Yes No	Tarther details on anything marked as Tes Offi age 2		
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At any time during the financial year, did you receive any overseas income of the following types: f) Rents g) Trust/Estate Distributions h) Foreign pensions / annuities i) Other (please specify) Please CIRCLE the correct answer of the following types: Yes No Yes No Yes No		Yes	No
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i) Other (please specify) Yes No	g) Trust/Estate Distributions	Yes	No
	h) Foreign pensions / annuities	Yes	No
If yes, please provide details of income and foreign taxes paid or deducted.	i) Other (please specify)	Yes	No
	If yes, please provide details of income and foreign taxes paid or deducted.		
Further details	Further details		

3. Expenses

	Please CIRCLE the	e correct answer
a) Do you have income protection insurance? If yes, provide a copy of your insurance policy wording and your annual invoice or certificate of premiums paid.	Yes	No
b) Did you incur any expenses against 'schedular payments? If yes, please provide details	Yes	No
c) Did you borrow money or incur any costs (e.g. commission or fees) in relation to any investments or non-salaried income? If yes, please provide full details.	Yes	No
Further details		

Investments (Crypto & ETFs)

At any time during the financial year, did you:

- a) Have any investments in Cryptocurrency?
- E.g. Bitcoin, Ether (Ethereum), XRP or any other digital currency
- a) Have any investments in ETFs (exchange-traded funds)?

If yes, please attach all documentation received for these investments, e.g.

- the market value of each of these investments at year end
- spreadsheets or documents confirming all purchases (cost and quantity)
- spreadsheets or documents confirming all sales (cost and quantity)
- taxable income statements

Further details		

Please CIRCLE the correct answer

No

No

Yes

Yes

5. Donations

Have you made any donations of \$5 or more to charitable organisations, schools, or religious organisations during the financial year?

If yes, please provide details and receipts

Please CIRCLE the correct answer		
Yes	No	

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Donee Organisation	Amount	Receipt Provided?
	Donee Organisation	Donee Organisation Amount

6. General

- a) Did you receive any other income not mentioned elsewhere in this questionnaire?
- b) Were you outside of New Zealand for a part of the 12 months ended 31 March 2024?

If yes, please state the date you arrived in and/or departed from New Zealand

Arrival Date

Departure Date

- c) Are you contemplating leaving New Zealand in the near future?
- d) Are you a citizen of any other country other than New Zealand?
- e) Do you expect there to be any changes to your income or expenses during the next financial year that could significantly affect your tax liability?

If you answered yes to any of the above, please provide full details.

	e correct answer		
	Yes	No	
	Yes	No	
!	/	/	
	//		
	Yes	No	
	Yes	No	
	Yes	No	

Further details	Fι	urt	her	deta	ıils
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7. Tax Credits & Family Entitlements Please CIRCLE the correct answer Yes No No Name Date of Birth IRD Number (if known) Number of Days per Week in Your Care

	/			
	/			
b) Did your relationship status chan If yes, please provide details (nature			Yes	No
c) Value of Child Support received during the year:		\$		
d) Value of Child Support paid during the year:		\$		
e) Total taxable income of your partner for the year (if not also PKF client): Please provide earnings confirmation for partner income for partner income e.g. IRD Summary of Earnings or Tax return		\$		
e) Have you already received any form of Working for Families support? E.g. weekly payments. If yes, please provide details.		support? E.g.	Yes	No
f) Have any of the children in your care left school and/or has there been a change in their custody during the year? If yes, please provide details in the table below		Yes	No	

Name	Date of Change	Nature of Change (e.g. left school, working full- time, in my care 5 days per week)
	/	
	/	
	/	
	/	

Further detail	ils			

8. Tax Refunds								
		Please CIRCLE your preferred option						
a) If your tax calculations result in a refund being due, would you like the refund:			in full pro		offset your onal tax y (if any)	ransferred to other taxpayer rith tax to pay		
b) If you are due a tax refund, which account would you like this to be o	Account Name:							
	Name:							
c) If you would like the refund tran another taxpayer, please provide of		IRD Number:						
Further details								
Forward Copy to External	Party							
						Please CIRCLE the correct answer		
a) Would you like us to forward fir returns to an external party? (e.g. <i>If yes, please provide contact infor</i>		Yes		No				
Name	Email Address				Type of Do	ocume	nts to Forward	