

<b>Records Required</b>	✓	Comments	
<b>Rental and Leased Property</b> - Please complete a rental questionnaire			
<b>Business Income</b> - Please complete a business questionnaire			
<b>Interest and Dividends</b>			
Please supply the advice slips. <ul style="list-style-type: none"> <li>For interest received, you should have an annual advice notice showing the withholding tax deducted. This may be on the bottom of your bank statement dated 31 March</li> <li>If any dividends are taken as bonus shares, also include these advice slips</li> </ul>			
<b>Overseas</b>			
Include overseas interest, dividends, wages received and taxation paid. <b>Note:</b> New Zealand residents are liable for tax on all world-wide income.  Please provide details of the value and quantity of the investments held at any time during the financial year. Please provide the date, value and details of any purchases, sales and income (dividends/ distributions or other).  Please attach all of your investments advisor's reports. This information is required so we can calculate if any income needs to be declared under the FIF (Foreign Investment Fund) rules. <b>Note:</b> FIF Calculations will be invoiced based on time and cost.			
<b>Any Other Income</b>			
Attach details <ul style="list-style-type: none"> <li>Income Replacement Insurance Policy – provide details of premiums and claims</li> <li>Loss Attributing Qualifying Company – if you have been allocated a share of a loss other than from a company that we are aware of, please provide details</li> <li>Partnerships, Trusts, Estates and company distributions</li> </ul>			
<b>Donations, Housekeeping and Childcare Tax Credits</b>			
Do you want us to complete your rebate claim form? If so, please attached receipts.			
<b>Working for Families Tax Credits and Parental Tax Credit</b>			
Please supply full names and birth dates of all children. Please note the following: <ul style="list-style-type: none"> <li>If you had a child born within the current financial year you may be eligible for the Parental Tax Credit. Please include their IRD Number below. If you do not have this you will need to obtain one for them in order to claim any entitlement for them</li> <li>Where a child has become financially independent during the current financial year, please advise the date they left school or home</li> <li>While every effort is made to ensure this is correct IRD hold information that can affect the calculations</li> </ul> Also provide details of any child support or maintenance payments made or received.			
<b><u>Child's Name</u></b>	<b><u>IRD No.</u></b>	<b><u>Date of Birth</u></b>	<b><u>Date left School</u></b>
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

**Thank you for completing this questionnaire. Don't forget to sign an Authority to Act**