

**PERSONAL TAX RETURN QUESTIONNAIRE
YEAR ENDED 31 MARCH 2020**

TAXPAYER NAME: _____

The following information is required to be able to complete your personal income tax return.

For any items that are applicable, please tick the appropriate box and provide the documentation required, or write additional details in the space provided.

<u>INCOME</u>	<u>DOCUMENTATION REQUIRED</u>	<u>APPLICABLE</u>
Salary & wages with PAYE deducted	We can obtain this information directly from the IRD on your behalf	<input type="checkbox"/>
Income with withholding tax (WHT) deducted (eg contracting income)	Please complete a "Business" Questionnaire (contact rebecca@millermountfort.co.nz for a copy of this)	<input type="checkbox"/>
Self employed income	Please complete a "Business" Questionnaire (contact rebecca@millermountfort.co.nz for a copy of this)	<input type="checkbox"/>
Interest received	Please provide copies of RWT certificates from the bank or any other institutions that interest has been received from	<input type="checkbox"/>
Dividends received	Please provide copies of dividend statements for all dividends received during the year	<input type="checkbox"/>
Rent received in your own name	Please complete a "Rental Property" Questionnaire (contact rebecca@millermountfort.co.nz for a copy of this)	<input type="checkbox"/>
"Air BnB" type income received	Please provide details of any income received from renting your home on an "Air BnB" type basis	<input type="checkbox"/>
Income received from a trust, partnership or company that we do not act for	Please provide documentation with details of this income	<input type="checkbox"/>
KiwiSaver investment	Please provide a copy of the annual tax certificate	<input type="checkbox"/>
Portfolio investment income	If you have funds invested with an investment manager in shares, bonds, etc, please provide copies of the investment manager's annual portfolio reports	<input type="checkbox"/>
PIE investments	Please provide copies of annual PIE investment statements	<input type="checkbox"/>
Share or cryptocurrency (eg Bitcoin) trading	If you are a trader in shares or cryptocurrencies (buying & selling for the purpose of making a profit), please provide details of any transactions during the year	<input type="checkbox"/>
Overseas income & investments	If you hold any investments overseas or have any income from overseas sources, please provide details of this	<input type="checkbox"/>

Any other income

If you received income from any other source not detailed above, please provide details below:

DEDUCTIONS

Income protection insurance

Please advise total premiums paid in relation to any income protection insurance held during the year.

\$ _____

Borrowings to fund investments or tax payments

If you have borrowed any funds specifically to purchase investments such as shares or an investment portfolio, or to pay for taxes due, the interest on this may be deductible. Please provide details of loans and interest paid.

REBATES

Donations

Please provide details of any donations made during the year, including:
School donations
Church donations
Other charitable donations

TAX RESIDENCY

Did you leave New Zealand last year or do you intend to leave New Zealand during the current year to move to another country?

Please advise date of departure from New Zealand

TAX REFUND (IF ANY)

In the event that your tax return preparation results in a tax refund due, please advise the bank account number you would like this to be paid into

DECLARATION

I accept responsibility for the accuracy and completeness of the information supplied in this questionnaire which is to be used in the calculation of my personal income.

Signed:

Date:
