

Miller Johnson Chartered Accountants

2018 Questionnaire for completion of individual income tax return

(one questionnaire to be completed for *each* person's return, and only for income received in your own name or jointly with another person)

Name:

Best contact method:

This questionnaire is designed to be completed one of three ways:

- Print, complete by hand, sign and return to us with your records
- Save the Word document to your computer, complete onscreen, save, and send back to us. If you use this option, the form will still need to be signed.
- Complete in the body of the email (if unable to use the attachment), and tick the statement at the foot of the email. The form will still require signature, and we will arrange this with you prior to completion of the financial reports.

For those clients who have used the Beancounter online interactive questionnaire in the past, and wish to continue to do so, please email annemarie@millerjohnson.co.nz. We will still require you to sign the declaration on the last page.

This questionnaire has been designed to be as simple as we can make it, given current tax laws and taxpayer and agent obligations.

It is important that you answer every question as indicated. Where your response indicates that a separate set of questions or more information is required, contact your usual accountant at our office.

When the questionnaire asks a question that you think we already know the answer to, please humour us and answer anyway. Two reasons for this – to some extent this questionnaire has to be generic, and (more important) things change, and we need up to date information from you.

Let's get started! All questions are for the year 1 April 2017 to 31 March 2018.

Did you have any income from which PAYE is deducted? (This includes: wages, withholding payments, NZ superannuation, benefits)? YES/ NO

If so, you do not need to take any further action. We will be able to access this information from the IRD website.

Investment income

Please answer ALL questions in this section, regardless of whether you receive income or not.

For all "Yes" answers, please supply supporting documentation (e.g. bank interest certificate, company dividend statements.) If we do not receive this information in full, this will delay and possibly increase the cost of preparation of your return.

Also include any income which you receive jointly with another person, and clearly mark this as joint income.

Do you receive any interest income? YES/ NO

Do you receive any dividend income? YES/ NO

Do you hold any funds in managed funds? YES/ NO

If yes, we will need the annual tax statement from your financial adviser

Do you hold any funds in PIE investments, including KiwSaver? YES/ NO
If yes, provide us with all annual certificates. We will need to establish that your PIE investments are being tax date the correct rate (PIR)

If you do NOT wish us to check your PIR, indicate below. We strongly recommend you take up this service.

I do not wish you to check the PIR on my investments

Property

Do you receive any income from any of these sources?

- Your own home is occasionally rented out such as Air BnB YES/ NO
- Your holiday home is rented from time to time to cover expenses YES/ NO
- You receive rent or board from people living in your home YES/ NO
- You have rental property investment(s) YES/ NO

If any of the above apply, contact us for a separate questionnaire.

In the 2017-18 financial year, have you bought or sold a property which is NOT your primary residence?
If yes, we will contact you for further information YES/ NO

Family

Do you have children who are under 19 years old? YES/ NO
If yes, we will contact you in preparing your income tax return, if you are eligible for family tax relief.

Offshore assets

Do you receive any income from overseas pensions? YES/ NO

What currency are you paid in?

Please forward us a copy of the Monthly Pension Statements.

Do you receive any income from overseas (which is not part of above answers)? YES/ NO

Do you hold any overseas assets? YES/ NO

If yes, list on a separate sheet and supply with this questionnaire

Inland Revenue activity is increasing in the area of overseas investments and assets. As well as this question, we will also require you to complete a declaration about overseas interests. If you are unsure about any aspect of this, contact us.

Charitable or school donations

Do you make any charitable donations? YES/ NO

If yes, do you wish us to prepare a tax rebate claim for you? YES/ NO

If you wish us to prepare your donations return, attach all receipts for charitable donations.

Withholding payments

Do you earn income which is subject to schedular payments e.g. real estate sales? YES/NO

If yes, contact us for a separate questionnaire

And good old miscellaneous – just as important but questions that don't fit elsewhere:

Do you have a student loan which has not yet been repaid? YES/NO

Do you pay interest on funds borrowed to invest in a business? YES/NO

If yes, how much did you pay in and to whom in the year?

Do you have income protection insurance? YES/NO

If yes, how much did you pay in premiums for this insurance only in the year?

If you received an inheritance, whether from NZ or overseas, advise details YES/NO

Did you receive income from a trust, business, or estate **for which Miller Johnson do not prepare financial accounts and income tax returns**, whether from NZ or overseas? YES/NO

If yes, outline briefly here, and either attach full details on a separate sheet or contact us to discuss

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Do you barter (exchange without money) for goods and/or services, let us know. YES/NO

Did you receive income from any other source, note below. *This includes any other money which comes in to your household.* YES/NO

Is there anything else you wish us to know, or want to say to us? Email or attach to this questionnaire, or give us a call.

Declaration

Finally, we need you to make some declarations. These declarations should be made by the individual named on the front page, or the name of the declarer clearly indicated below. **If you are unable to state any of the three declarations i.e. they are NOT true or correct, strike a line through that declaration. We will be in touch.**

With respect to the year ended 31 March 2018:

1. I declare that all income from all sources, received by me has been included in the records supplied to Miller Johnson.
2. I declare that I hold no overseas financial interests of any kind, including but not limited to – bank accounts, credit cards, property, loans, superannuation.
3. I declare that I have completed this questionnaire to the best of my knowledge and completely.

(Signed)

(Name)