

Miller Johnson Chartered Accountants

2020 Questionnaire for completion of individual income tax return

For Non-Resident for tax purposes

(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:

Date required by:

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

- Print, complete by hand, sign and return to us with your records
- Complete and submit online (Email supporting documents to team@millerjohnson.co.nz)

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 2019 to 31 March 2020 and relates to income from New Zealand sources only.

Did you receive any income from New Zealand 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 from New Zealand sources only

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 taxed at 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 rental property investment? YES/ NO
If yes, complete our rental questionnaire.

In the 2019-20 financial year, have you bought or sold a property? YES/ NO
If yes, we will contact you for further information

And other items – 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?

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, from NZ only?** 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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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 either of the two 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 2020:

1. I declare that all income from all New Zealand sources, received by me has been included in the records supplied to Miller Johnson.
2. I declare that I have completed this questionnaire to the best of my knowledge and completely.

Either Tick the box in Option A for online forms, or for Option B, sign below for paper forms.

A. I authorise you to use this information to prepare my returns.

B.

(Signed)

(Name)