

2021 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: 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.

All questions are for the year 1 April 2020 to 31 March 2021.

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 IRD.

Withholding payments

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

- *If yes, supply copies of all commission slips.*
- *If you incur expenses related to this income, also complete our business questionnaire.*

Investment income

It is important you 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 KiwiSaver? 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 of these sources?

- Do you own (or part own) any investment rental property? YES/ NO

If yes, complete a rental questionnaire for each property.

- 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

If any of the above apply, we will contact you.

In the 2020-21 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?

If yes, we will contact you in preparing your income tax return, if you are eligible for family tax relief. YES/ NO

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, or your bank statements.

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

Do you hold any overseas assets? YES/ NO

If yes, list on a separate sheet and supply to 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, send us all receipts for charitable donations.

Miscellaneous (we will contact you for more information as required)

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

Do you trade shares i.e. buy and sell for profit? 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

Do you hold or trade any cryptocurrency, supply details 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 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 2021:

1. I declare that all income from all sources, received by me has been included in the records supplied to Miller Johnson.
2. Except as stated above, 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.

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)