

Individual Tax Returns - 2024

Please ensure this questionnaire is completed, signed and included with your records

Client Name		Phone:	
Balance Date	31 March 2024	E-mail:	

To: Neogen Chartered Accountants Ltd

I instruct you to prepare my financial statements on a compilation basis for the 2024 financial year.

I undertake to supply all records and information necessary to carry out this work and will be responsible for the accuracy and completeness of the records and information provided. I also accept responsibility for any failure by me to supply all relevant records and information and I understand that you will rely upon the information and records provided by me.

I also instruct you to prepare my taxation returns for the 2024 financial year. I undertake to supply all information necessary to perform this work and will be responsible for the accuracy and completeness of such information.

I understand that the financial statements and taxation returns are prepared for my own use and to determine my taxation liabilities. If this should change in any material respect, I will inform you immediately. I understand you will not accept any responsibility to any person, other than me for the contents of the financial statements.

I understand that all the other terms and conditions of the work to be performed are the same as those referred to in the terms of engagement letter that has been sent to me.

You are authorised to communicate with my bankers, solicitors, finance companies and all Government agencies to obtain such information as you require in order to complete the above assignments.

I also authorise you to act as my agent in dealing with all taxation matters with Inland Revenue.

Signature: _____ Date _____

If sending this back by email, please type your name in above – otherwise sign it. By doing so, you are acknowledging that you accept the above terms and conditions of the engagement.

Inland Revenue only refunds the tax credit by direct credit. Would you please advise the bank account number you would like any refunds deposited in to:

Account number: _____

Income		Information Required
1. Wages / National Superannuation / Benefits	Y N	
Wages or salary with PAYE deducted	Y N	
National Superannuation	Y N	
Other Benefits	Y N	
2. Schedular Payments	Y N	
Do you receive schedular payments with withholding tax deducted?	Y N	Please complete <u>Annual Questionnaire - Business</u> .
3. New Zealand Interest and Dividend	Y N	
Interest Received from NZ Banks	Y N	Certificate of Resident Withholding Tax
Dividend received	Y N	Dividend Advices
Interest and Dividend received from Portfolio Investment Entities	Y	Annual Portfolio Earning Summary Report
Power company dividends (Entrust)	Y N	Certificate of dividend
Have you had any shares released by employee share schemes	Y N	Related documentation and dividend Advice
4. Overseas Income and Investments	Y N	Complete overseas income declaration form
<p>Note: New Zealand residents are liable for tax on all worldwide income. As of the financial year 2023, IRD have updated more detailed declaration forms for overseas income-Overseas income summary-IR261. Please accurately advise us your foreign income and we will clearly declaring your foreign income.</p>		

Income		Information Required
5. Rental Income / Mixed Use Holiday Home	Y N	
Rental income received from your investment properties	Y N	Please complete <u>Annual Questionnaire - Rental</u> for each property.
Rent received exceeds \$4,000 for your mixed use Holiday home or rent received from short term rentals, i.e. Airbnb	Y N	Please complete <u>Annual Questionnaire - Rental</u> for each property.
6. Partnerships, Trusts, Estates and Companies	Y N	
Receive any income distributed from the above entities	Y N	Please supply details of income received.
7. Income Protection Insurance	Y N	
Insurance income received from / Insurance premium paid for income protection policy	Y N	Payment advices/Premium invoice
8. Donations	Y N	
Do you want us to complete your rebate claim form?	Y N	Donation receipts including school donation
9. Transfer of the Properties	Y N	
Did you transfer your properties to your family trust? Is there any forgiveness of debt?	Y N	Please provide details
10. Working For Families Tax Credits	Y N	
Do you or your partner receive Working For Families Tax Credits?	Y N	