



## Personal Questionnaire

Name: \_\_\_\_\_

Year Ended: 31 March 2019

Address: If this has changed please advise. \_\_\_\_\_

- |   | <i>Yes/No?</i>           | <i>Information to send:</i>   |
|---|--------------------------|---|
| 1. Did you receive interest or dividends?   | <input type="checkbox"/> | End of year interest statements<br>Dividend statements  |
| 2. Are you a shareholder or a director of a company that Figure It Out does not act for.                                    | <input type="checkbox"/> | Name and contact details for the Accountant preparing financial statements for each other entity.                                   |
| 3. Do you receive income from an Estate, Trust, Partnership or Business that Figure It Out does not act for?                | <input type="checkbox"/> | Name and contact details for the Accountant preparing financial Statements for each other entity.                                   |
| 4. Do you receive rental income?  | <input type="checkbox"/> | Refer to figureitout.co.nz to download and complete a rental income questionnaire OR contact us if you wish for us to send you one. |
| 5. Do you have a student loan?<br>(Note: You may have a repayment obligation)   | <input type="checkbox"/> | Yes/No?   |
| 6. Did you receive income from overseas (e.g. Interest, Dividends, Rental Income, Self-employed Income, Pensions or other?) | <input type="checkbox"/> | Please provide paperwork  |

**PLEASE READ**

7. Global Automatic Exchange of Information (AEOI) is alive and well.

If you have overseas investments, shares, bank accounts, credit cards, or properties, an overseas pension, annuity, or right to receive overseas superannuation or life insurance; it's important to tell us about these as it has already been reported to a common body.

Do you have any of the above?

Yes/No?

If yes, we will contact you to discuss this further.

- |   |                          |                                     |
|---|--------------------------|-------------------------------------|
| 8. Do you receive any self-employed income?<br>(e.g. Contracting income, self-employed income, royalties)   | <input type="checkbox"/> | Details of income                   |
| 9. Do you receive any of the following other types of income? <ul style="list-style-type: none"> <li>• Sale of land and buildings</li> <li>• Sale of shares, bonds or other investments (family home or Bach)*</li> <li>• Any other income</li> <li>• Employee share option program</li> <li>• Share options</li> </ul> | <input type="checkbox"/> | Details and documentation required. |
| 10. Do you have investments/shares in a managed portfolio?<br>Please provide portfolio advisor statement if yes.  | <input type="checkbox"/> | Yes/No?                             |

\* New bright-line rules apply to property sales; we will contact you if this applies to your situation



- 11. Did you incur any expenses relating to earning your income, for example, income protection insurance or interest on loans used to purchase investments?  Confirmation of any premiums paid for income protection insurance  
Details and invoices for other expenses
- 12. Did you make any donations during the year?  Donation receipts
- 13. Do you have any PIE investments (eg, Kiwisaver)  Give details .....
- 14. Bank Account number for refunds .....
- 15. Declaration  
I hereby instruct you to prepare my tax return. I accept responsibility for all records and information supplied to you for the purpose of preparing my Income Tax Return. I accept responsibility for any failure by me to supply all relevant records and information to you. You are hereby authorised to communicate with my bankers, solicitors, finance companies, all government agencies and any other necessary parties to obtain such information as you require to carry out the above assignments.

You are also requested to represent me as my tax agent for all types.

Signature \_\_\_\_\_ Date \_\_\_\_\_

