



COOK NORTH & WONG LIMITED  
CHARTERED ACCOUNTANTS

## 2024 Personal Taxation Questionnaire

Ensure this questionnaire is completed and included with your records

Phone:		Client Name:	
Email:		Balance Date:	

### ENGAGEMENT STATEMENT

I authorise you to prepare my Tax Return from the information and records I have supplied to you. I advise you not to complete an audit or review. I accept responsibility for the accuracy and completeness of all records and information supplied to you. You are authorised to communicate with the appropriate Bankers, Solicitors and other persons/organisations (including the Inland Revenue for all tax types) to obtain such further information as you may require in order to carry out the above engagements.

Our full Terms of Engagement are set out in the letter which you have previously signed.

Date .....

Signed .....

**This questionnaire must be signed and returned to this office before we can commence your 2024 work. Please ensure all points which apply to you are completed before arranging an interview with us.**

Records Required	/	Comments
<b>SALARY, WAGE AND SCHEDULAR PAYMENTS INCOME</b>  You do not need to provide information about income, salary, wages received from schedular payments as the IRD provides this information directly to us. However, if you have received this income tick here:  Attach receipts or provide details for employment related expenses related to income from schedular payments.	  <input type="checkbox"/>  <input type="checkbox"/>	
<b>INVESTMENTS - SHARES AND DEPOSITS</b>  <b>Deposits</b> Please provide: <ul style="list-style-type: none"><li>Year-end statements for all deposits held by you at balance date.</li><li>Certificates summarising annual interest earned, and RWT deducted for each deposit.</li></ul>	  <input type="checkbox"/>  <input type="checkbox"/>	

Records Required	/	Comments
<p><b>INVESTMENTS - SHARES AND DEPOSITS - cont'd</b></p> <p><b>Shares</b> Please provide:</p> <ul style="list-style-type: none"> <li>• Details of any share purchases or sales by the business during the year. <i>These details need to include the price, number of shares traded and date of sale/purchase.</i></li> <li>• Dividend statements for any dividends received during the year.</li> </ul> <p><b>Portfolio Investment Entities</b> Please</p> <ul style="list-style-type: none"> <li>• Provide details of any investments in New Zealand Portfolio Investment Entities (PIEs) that were acquired in the year or converted into PIEs during the year.</li> <li>• Advise the Portfolio Investor Rate as notified to any PIE manager in the year.</li> <li>• Provide copies of all distribution summaries received from PIE managers.</li> </ul> <p><b>Portfolio Summary Reports</b> If you use an investment manager or advisor, please provide a copy of any portfolio summary reports received in respect of the year.</p>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	
<p><b>OFFSHORE EQUITY INVESTMENTS</b></p> <p>Offshore equity investments may now be subject to income tax under the Foreign Investment Fund (FIF) or Controlled Foreign Company (CFC) rules. Complex calculations may be required. These calculations may have been done for you already and summarised in a portfolio summary report provided by an investment manager or advisor.</p> <p>Please provide us with details of:</p> <ul style="list-style-type: none"> <li>• All foreign equities owned during the year (name of equity, country of residence, number of shares/units etc);</li> <li>• Their cost price if acquired during the year or market value as at the start of the year if already owned;</li> <li>• Any income distributions or sale proceeds received;</li> <li>• If you own more than 40% of an overseas company as an individual or you are in a group of 5 or fewer New Zealand residents that has total control interests of more than 50% we will require a copy of the financial statements.</li> </ul> <p>Alternatively, if you would like to use our spreadsheet template to help calculate the extent of any FDR income, please contact us.</p>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	
<p><b>RENTAL INCOME</b></p> <p>Attach details of gross rents received and expenses incurred – show addresses of property. Supply source data or attach full list of required information.</p>	<input type="checkbox"/>	
<p><b>LTC</b></p> <p>Provide details of any loss to be claimed from a Look Through Company for the year.</p>	<input type="checkbox"/>	
<p><b>SALE OF PROPERTY</b></p> <p>If any property was sold during the year other than a private residence please provide details.</p>	<input type="checkbox"/>	
<p><b>INCOME PROTECTION INSURANCE</b></p> <p>Amount of any premium paid during year under a Loss of Earnings Policy.</p> <p style="text-align: right;">\$.....</p>	<input type="checkbox"/>	

Records Required	/	Comments
<p><b>OTHER INCOME</b></p> <p>Please attach full details of any other income (e.g. royalties, share of partnership/trust/estate income, overseas income, income from share or property dealing, business or self-employed income, shareholder employee salary, taxable Maori authority distribution, etc).</p> <p>Please attach details of expenses incurred in earning income (e.g. commissions, ACC levies, interest on loans used to acquire investments, etc). Do not include expenses related to earning your employment income.</p>	<input type="checkbox"/>  <input type="checkbox"/>	
<p><b>WORKING FOR FAMILIES TAX CREDITS</b></p> <p>If you or your partner are registered for Working for Families Tax Credits please contact the office for a Working for Families fact sheet.</p>	<input type="checkbox"/>	
<p><b>DONATION REBATES</b></p> <p>In order to claim a rebate for registered charities, church organisations, school boards etc. please supply us with the relevant receipts. If you wish to complete the donation claim yourself you can download the appropriate form from the IRD website.</p>	<input type="checkbox"/>	
<p><b>INDEPENDENT EARNER TAX CREDIT</b></p> <p>If you expect to have an annual income between \$24,000 and \$48,000 you may be entitled to this tax credit.</p> <p>This tax credit cannot be claimed if you receive an income tested benefit, Working for Families Tax Credits, Veteran's Pension or NZ Superannuation. If you have received any of these benefits for any part of the year please advise the period that they were received.</p>	<input type="checkbox"/>	
<p><b>STUDENT LOAN</b></p> <p>Do you have a student loan?</p>	<input type="checkbox"/>	
<p><b>FOREIGN SOURCED INCOME</b></p> <p>Do you have Foreign Sourced Income (including superannuation)? Please provide details.</p>	<input type="checkbox"/>	
<p><b>TRUSTEE OF A FOREIGN TRUST OR ESTATE</b></p> <p>Are you a trustee of a Foreign Trust or Estate? If so we may require additional information later</p>	<input type="checkbox"/>	

**Don't forget to sign on front page**