

**NON- RESIDENT PERSONAL INFORMATION QUESTIONNAIRE
FOR THE YEAR ENDED 31 MARCH 2022**

Please confirm your contact details:			
Name		Home telephone	
Postal address		Office telephone	
		Mobile telephone	
Contact person		Email Address	
Bank Acc No. (for tax refund)		ACC number	

It is a requirement for us to retain a questionnaire on file for each income year. We thank you for taking the time to complete this questionnaire for each trading entity that requires financial statements and/or an income tax return to be prepared.

If you have any queries about how to complete this questionnaire please contact us on (09) 968 4440. Please return the completed and signed questionnaire with your financial records.

TERMS OF ENGAGEMENT
(as per Institute of Chartered Accountant of New Zealand recommended text)

I accept responsibility for the accuracy and completeness of the information supplied in this questionnaire which is to be used in the preparation of my financial statements. You are not to complete an audit, nor do I wish you to undertake a detailed review of my affairs in order to substantiate the accuracy of my information, and therefore you are unable to provide any assurance on my financial statements. I understand your work cannot be relied on to detect error and fraud and that you accept no liability for the accuracy and completeness of the information supplied by me. I further understand that the financial statements will be prepared at my request and for my purposes only and that you will not be liable for any losses, claims or demands by any third person. I also accept responsibility for all other records and information supplied to you other than those listed below.

I accept responsibility for any failure by me to supply all relevant records and information to you.

I understand that Walker Wayland Auckland Ltd will endeavour to lodge my income tax return by the due date. However, if information required to prepare this income tax return is delivered late, the Walker Wayland Auckland Ltd will not be liable for late lodgement penalties and/or interest charges.

I personally guarantee to pay accountancy fees rendered and authorise Walker Wayland Auckland Ltd to apply tax refunds against any outstanding debt.

I hereby declare that the above information is true and correct

DATE _____ **SIGNATURE** _____

CLIENT ACCEPTANCE FORM

In respect to Non-Disclosure we also authorise Walker Wayland Auckland Ltd personnel to act as required under sections 20B to 208 of the Tax Administration Act 1994.

You give your full authority to us to contact any organisation (including your bank, financiers, insurers, city council and the Inland Revenue Department) for the purposes of obtaining information necessary to complete your various taxation returns and financial statements. Information from Inland Revenue Department is through all channels, including electronic. The authority to obtain information is for all tax types except Child Support. You acknowledge that this information would not otherwise be available due to the Privacy Act restrictions, but you give your full authority for this statement to be used as a written confirmation of your agreement to us obtaining information for any organisation, as listed above on the signed consent statement, for the abovementioned purposes. This also includes linking all person(s) and entities to our agency list as your tax agent.

Accident Compensation Corporation

You authorise Walker Wayland Auckland Ltd to act as your agent for ACC levy purposes for all associated entities. This authorisation allows Walker Wayland Auckland Ltd to query and change information on your ACC levy account(s) through ACC staff, and through ACC Online Services. This authority will also allow Walker Wayland Auckland Ltd main representative discretion to delegate access to your ACC information to other members of Walker Wayland Auckland Ltd. Other delegated members of Walker Wayland Auckland Ltd will also be able to query and change information on your ACC levy account.

Acceptance

The terms of this engagement and the general terms and conditions are accepted.

DATE _____ **SIGNATURE** _____

SECTION A: NEW ZEALAND SOURCED INCOME

Please Circle or Highlight

- | | | |
|----|--|----------|
| 1. | Did you undertake work during the year for an New Zealand Employer who deducted either PAYE or withholding tax from those earnings?

Please provide full details if so. | YES / NO |
| 2. | Did you receive a New Zealand pension during the year?

Please attach details of all pensions or annuities received. | YES / NO |
| 3. | Please attach all New Zealand Interest & RWT certificates for all savings and investment accounts, including joint accounts. | YES/ NO |
| 4. | Please attach all New Zealand dividend notification slips with payment dates between 1 April 2021 and 31 March 2022. | YES/ NO |
| 5. | Are you a shareholder in a New Zealand look through company (LTC), or a partner in a New Zealand partnership for which Walker Wayland Auckland Ltd does not prepare the tax returns?

Please supply 2022 financial statements and tax returns. | YES / NO |
| 6. | Please attach details of any New Zealand PIE (Portfolio Investment Entity) income earned. | YES/ NO |

7. Do you own, or have you purchased during the year, a commercial or residential property which is rented out in New Zealand? YES / NO
 Please list addresses below.

a) Please enclose a copy of the sale and purchase agreement and Settlement statement(s) for any rental property/properties purchased during the year. YES / NO / N.A

b) Please supply a list of all chattels for each property purchased during the year. Please record their market value at time of purchase YES / NO / N.A

c) Details of rent received and expenses incurred, including interest, rates, insurance, body corporate fees, and repairs & maintenance for each property, should be recorded on the bank statements/electronic downloads. YES / NO / N.A

d) If you have used a rental agent, please enclose real estate summaries. YES / NO / N.A

NB. It is important that prior to selling any rental property you contact our office in order to help manage any potential depreciation recovered on the sale, and to discuss the brightline tests for potential taxation of property gains.

10. Did you receive any other New Zealand income, e.g. Estate or Trust income? YES / NO
 If YES, please attach details.

11. Have you been offered any share options by your New Zealand employer during the year which you have accepted? YES / NO
 If YES, please attach details of these including the terms and conditions.

12. Do you pay income protection insurance in New Zealand? YES / NO
 If YES, please attach a confirmation of the premiums paid for the year ended 31 March 2022.

13. Does the policy provide for an agreed sum or is any pay-out based on earnings? YES / NO
 If so, please advise how much the agreed sum is: _____