

**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: INCOME**

**Please Circle or Highlight**

1. Did you undertake work during the year for an Employer who deducted either PAYE or withholding tax from those earnings?  
Please provide full details if so. YES / NO
2. Did you receive a pension during the year?  
Please attach details of all pensions or annuities received. YES / NO
3. Please attach all Interest & RWT certificates for all savings and investment accounts, including joint accounts. YES / NO
4. Please attach all dividend notification slips with payment dates between 1 April 2021 and 31 March 2022. YES / NO
5. Are you a shareholder in a look through company (LTC), or a partner in a 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 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 (either in New Zealand or overseas)?  
Please list addresses below. YES / NO

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8. If you own (or control via another entity) shares or investments in organisations which operate in foreign countries, or if such investments were bought or sold during the year, the Foreign Investment Funds rules apply to these.

Do you have;

- |   |          |
|---|----------|
| a) Australian shares?   | YES / NO |
| b) Other foreign shares?  | YES / NO |
| c) Investments in foreign unit trusts?  | YES / NO |
| d) Investments in foreign life insurance, endowment etc policies?                 | YES / NO |
| e) Investments in foreign superannuation or pension funds?                        | YES / NO |
| f) Investments in any other kind of foreign company, individual or equity scheme? | YES / NO |
| g) Loans from any foreign company, individual or equity scheme?                   | YES / NO |
| h) Overseas bank accounts   | YES / NO |

**If you have answered YES to any of the questions above in 8, we will contact you to obtain further information.**

9. Did you purchase and sell any shares or properties during the year for purposes other than investment? (i.e.: share trading, property speculation).  
If YES, please attach details. YES / NO
10. Did you receive any other income, e.g. Estate or Trust income?  
If YES, please attach details. YES / NO
11. Have you been offered any share options by your 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? YES / NO  
If YES, please attach a confirmation of the premiums paid for the year ended 31 March 2022.  
  
Does the policy provide for an agreed sum or is any pay-out based on earnings?  
If so, please advise how much the agreed sum is: \_\_\_\_\_
13. Did you receive any lump sum withdrawals or transfers to a New Zealand or Australian pension scheme from an overseas pension scheme? YES / NO
14. Did you buy, sell and/or hold any cryptocurrency investments at any time during the year? Did you receive any mining income from cryptocurrencies? YES / NO  
  
If YES, please let us know and we will assess your personal situation in regards to tax implications.
15. Did you receive any COVID- 19 wage subsidy as a sole- trader? YES / NO  
  
If YES, please provide the amount and date received.
16. Did you receive any COVID- 19 wage subsidy as a shareholder employee of a company? YES / NO  
  
If YES, please provide the amount and date the company received for you.
17. Did you receive any Covid-19 grants or business loan? YES / NO  
  
If YES, please provide the amounts and date it was received.

**SECTION B: EXPENSES**

**COMPLETE THIS SECTION ONLY IF YOU OPERATE AS A SOLE TRADER OR INDEPENDENT CONTRACTOR.**

1. Do you have any expenses to offset against Withholding/Schedular Payments? YES / NO

If YES, please attach details.

2. **Home Use**

- (a) Is a room in your house set aside **solely** for business use? YES / NO

If the room is not set aside **solely** for business use, how often is it used? \_\_\_\_\_ days/month

Please also advise:

- Room Area: \_\_\_\_\_ sqm
- Total House Area: \_\_\_\_\_ sqm

(b) Please record your Home Expenses for the year

Body Corporate	\$ _____
Rates (ARC, Local and Water)	\$ _____
Telephone	\$ _____
Power (Heat & Light)	\$ _____
Interest on Mortgages to purchase	\$ _____
Insurance on Building & Contents	\$ _____
Rent Paid	\$ _____
Repairs & Maintenance	\$ _____

Please provide further details of any Repairs & Maintenance if applicable:

\_\_\_\_\_

\_\_\_\_\_

3. Please provide a copy of any ACC invoices paid this year.

**SECTION C: WORKING FOR FAMILIES TAX CREDITS (WFTC)**

If you have dependent children 18 years or younger, you may be eligible for a Tax Credit depending on your joint Taxable Income.

1. Did you receive Working for Families payments during the past year? YES / NO

2. Does our office prepare your spouse's tax return? YES / NO

If NO, please provide us with a copy of his/her 2022 tax return.

3. Have you married, separated or otherwise changed your family circumstances during the year to 31 March 2022? YES / NO

4. Have you received or paid child support or maintenance to/from any person during the year? YES / NO

If so, please provide details.

5. Were you a wage/salary earner during the year? YES / NO

If YES, on average how many hours per week were you working?

\_\_\_\_\_hours (couples a minimum of 30 hours for IWTC)

\_\_\_\_\_hours (sole parent a minimum of 20 hours for IWTC)

How many weeks did you work over the minimum hours to be eligible for IWTC?

\_\_\_\_\_weeks (couples)

\_\_\_\_\_weeks (sole parent)

If reduced working hours due to Covid-19 can still get in-work credits.

6. Did you have a newborn baby during the year? YES / NO

Have you already claimed the Parental Tax Credit? YES / NO

7. Please list the names, dates of birth, IRD numbers for your family dependents and whether they are in Preschool, school, tertiary education or working, if claiming for the first time.



## **SECTION D: DONATIONS**

Did you make a charitable donation of \$5 or more, e.g. to New Zealand Charities, State and Private Schools, Pre-School or Church offerings?

YES / NO

To be eligible for the rebate, school (private, public or kindergarten) donations must be a donation to the school general fund, **not** activity fees. The receipt must have the word 'donation' written on it.

**Please supply receipts.**