

## 2025 – Personal Questionnaire

Please provide us with the following documentation:

- Resident Withholding Tax Certificate
- Donation/s Certificate/s
- Vehicle Loan Documents
- Housing Loan Documents
- Other Loan Documents
- Hire Purchase Documents
- Bank Balance as of 31.03.2025
- Outstanding Debtors
- Outstanding Creditors
- Any new Bank Account Statements
- Fixed Asset register: please advise of any sold/disposed assets & any new purchases

1. Were there any Interest and/or Dividends Received?
  - Yes - Attach Dividend Advice Notice/s, any joint income, any spouses' interest
2. Were any changes made to Shareholdings from 01/04/2024 – 31/03/2025?
  - Yes - Attach: a schedule detailing shares bought and/or sold
3. Do you have a Pension?
  - Yes – Attach details of any pension/s received (*including overseas*).
4. Do you have Shares in Estate/s or Trust/s?
  - Yes - Attach: details of your shares of any taxable income, tax or imputation credits
5. Do you have Shares in a Partnership?
  - Yes - Attach details of your shares of any taxable income, tax or imputation credits
6. Do you receive Distributions from Unit Trusts?
  - Yes - Attach details
7. Do you have any other Income Sources?
  - Yes - Attach details of any other income received: Joint Income/ Overseas Income/ Overseas Insurance Policies



8. Did you receive any income or payments for providing childcare services?  
 Yes - Attach details of gross income received, the number of hours/ weeks worked, any annual rental paid and/or cost price of house/s owned.
9. Do you have any Income Protection Insurance?  
 Yes - Attach Annual Premium Notice
10. Were you unemployed for part of the year, absent from New Zealand for a significant period or missed work for some other reason?  
 Yes - Attach details of timings and any other relevant documents
11. Do you have any expenses such as interest on loans that have been used to acquire investments?  
(e.g. to purchase shares or rental properties)  
 Yes - Attach Sales and Purchase Agreements/ Statements/ details of timings/ Any other relevant documentation
12. Do you have small children?  
 Yes  
- Have you applied for an IRD number for them?  
- Have you completed your Donation and School Fees rebate claim form?  
- Have you registered for Working for Families? *Note: This will affect the final figure of any tax refund or payment*
13. Are you utilising a fund manager for any financial investments?  
 Yes - advise any brokerage fees/ expenses
14. Did you or will you receive income or shareholder salaries from a business or entity for which Active Chartered Accountants do not prepare the Annual Financial Statements?  
 Yes - Attach supporting information and/or copies of the Financial Statements
15. Did you, or will you, receive losses from a partnership or LTC for which Active Chartered Accountants do not prepare the Annual Financial Statements?  
 Yes - Attach supporting information and/or copies of the Financial Statements  
 No

16. Is there any other relevant information or comments that you would like to make?