

Client Name: _____

Address: _____

rova
CHARTERED ACCOUNTANTS

34 Bannister Street
PO Box 178
Masterton 5840
P 06-377 2333
F 06-377 2334
E admin@rova.co.nz

2019 Individual Questionnaire

Please complete this questionnaire, sign over the page and return with your records.

Information we need	Yes/No/NA	Comment
Wages/National Superannuation/Schedular Payments/Benefits Did you receive any wages, salary, WINZ payments or schedular payments where PAYE or Withholding tax was deducted? In most cases IRD will have sent us these details directly, however we do need to check all details have been included.		
Interest and Dividends Did you receive income from interest or dividends, including PIE distributions? If so, please include statements.		
Overseas Income – interest, dividends, wages received <ul style="list-style-type: none">• Did you receive income from overseas?• Did you receive any foreign superannuation payments? If so, please include statements.		
Other Income <ul style="list-style-type: none">• Have you been allocated a share of profit/loss from any entity that we do not complete the work for?• Did you receive income from a rental property?• Did you receive income from a bach/holiday home?• Did you receive income from any source from which no tax has been deducted? If so, please supply details.		
Student Loan Do you have a student loan? If so, please provide your latest statement from IRD, including interim and voluntary repayments.		
Any Other Information <ul style="list-style-type: none">• Do you have an Income Replacement Insurance Policy? If so, provide details of premiums and/or claims.• Do you have any expenses to claim?• Have you sold a residential property within two years of purchase? If so, please provide details.		
Donations/Tax Rebates Did you make any donations during the year? If so, please attach receipts.		
Other relevant information Is there any other information that you consider relevant to the preparation of your 2019 Income Tax Return? If so, please provide details.		

Working for Families Tax Credits and Parental Tax Credits

Please complete for all your dependent children:

Child's Full Name	IRD No.	Date of Birth	Date left school (if applicable)
Changes in care Have there been any changes to your family circumstances in the past year? If so, please provide details.			
Custody Details Do you share custody of your children with anyone other than your partner? If so, please provide details.			
In-work Tax Credit For any week during the financial year, did you and your partner work more than 30 hours a week (20 hours if single)? If yes, please indicate how many weeks.			
Also please provide details of: <ul style="list-style-type: none"> ▪ Any child support or maintenance payments made or received ▪ Other payments received by family members exceeding \$5,000 ▪ Any income received by your children ▪ Income/drawings received from a Trust, including any school fees paid by the Trust ▪ Any other monies received eg. loans/gifts from family, Companies or Trusts ▪ Any employer provided motor vehicles when salary is exchanged for private use. ▪ Any vouchers and other short-term charge facilities provided by your employer. 			

Bank Account Details

The IRD will no longer be paying refunds by cheque. Please provide details of the bank account you would like any refunds paid into.

Account Name: _____

Account Number:

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Please complete the details to the right so that we can update our records.	Work phone	
	Mobile	
	Email	
	Birth date	

Signature _____ **Date** _____**Thank you for completing this questionnaire.**