Individual Questionnaire – 31 March 2026

Ensure this questionnaire is completed and included with your records

Client Name:		Phone:	
IRD Number:		Balance Date:	31 March 2026
Email:			

To: Smith Mitchell Limited

Terms of Engagement

I hereby instruct you Smith Mitchell Limited and staff/contractors as applicable to prepare my Taxation Returns for the 2025 year. I undertake to supply all information necessary to carry out such services and will be responsible for the accuracy and completeness of such information.

Authority is given to obtain information from Inland Revenue, other government agencies and financial institutions about all tax types (except child support), bank and loan accounts in order to complete the above assignments. This includes obtaining information through all Inland Revenue media and communication channels including electronic ones.

I authorise your organisation to act as my agent for ACC levy purposes for all associated entities. This authorisation allows your organisation to query and change information on my ACC levy account(s) through ACC staff, and through MyACC for Business. This authority will also allow your organisation's main representative discretion to delegate access to my ACC information to other members of your organisation. Other delegated members of your organisation will also be able to query and change information on my ACC levy account.

You are to represent me as my tax agent. All income tax returns will be signed by me however you are authorised to sign any other taxation return on behalf of myself or any of my associated entities.

I also accept that you have the right to charge interest on overdue accounts at the rate of 1.5% per month, and that all accounts are due for payment by the 20th of the month following invoice date. The charging of such interest will be at your discretion. I accept that any collection costs you incur will be fully recoverable from me.

Signature ____________________________________ Date ________________________

Records Required	✓	**Comments**
Wages/National Superannuation/Benefits		
Please provide us with the names of any organisations you have received the following from: ▪ Wages ▪ Termination or incentive payments ▪ ACC payments ▪ National Superannuation ▪ Any other benefits In most cases IRD will have sent us these details direct, however we do need to check all details have been included.	☐ ☐ ☐ ☐	
Student Loan		
Do you have a student loan? If so, please provide your latest statement from IRD	☐	
Interest and Dividends		
Please supply the advice slips. ▪ For interest received, you should have an annual advice notice showing the withholding tax deducted. This may be on the bottom of your bank statement dated 31 March ▪ If any dividends are taken as bonus shares, also include these advice slips	☐ ☐	

Rental and Leased Property		
Please complete attached rental questionnaire	☐	
Mortgage Interest Paid on Residential Properties		
Have you incurred interest on residential properties owned (which is not your main family home or a 'new build*')? Is the interest also against properties other than residential rentals? If so, please provide details of amount of interest and dates paid. * A new build is a self-contained residence that receives a Code Compliance Certificate confirming the residence was added to the land on or after 27 March 2020	☐	
Partnerships, Trusts, Estates and Companies		
Please supply details of income earned from any entity for which we do not prepare the accounts and tax returns.	☐	
Overseas		
▪ Supply details of overseas interest, dividends, wages received, any other income, and taxation paid ▪ Provide details of any overseas investments held at any time during the financial year ▪ Attach all of your investments advisor's reports ▪ Have you at any point in your lifetime, ever contributed to a foreign superannuation scheme, even if you cannot receive the benefits until you retire?	☐ ☐ ☐ ☐	
Any Other Income		
Attach details: ▪ Income Replacement Insurance Policy – provide details of premiums and claims ▪ Look Through Company or Partnerships – if you have been allocated a share of income or a loss other than from a company that we are aware of, please provide details ▪ Did you receive income from any other sources either taxable or non-taxable? If Yes, please provide details (e.g. Uber, Airbnb, services through platforms such as Pocket Job, Airtasker etc).	☐ ☐ ☐	
Donations		
Do you want us to complete your rebate claim form? Yes ☐ No ☐ If so, please attach receipts.	☐	
Working for Families Tax Credits and Parental Tax Credit		
Please supply full names and birth dates of all children. Please note the following: ▪ If you had a child born within the current financial year you may be eligible for the Parental Tax Credit. Please include their IRD Number below. If you do not have this you will need to obtain one for them in order to claim any entitlement for them ▪ Where a child has become financially independent during the current financial year, please advise the date they left school or home	☐	

Child's Name	IRD No.	Date of Birth	Date left School

If you have received Working for Families Tax Credits during the year, please supply the certificate issued to you by IRD, detailing the amounts.	☐	
Also provide details of any child support or maintenance payments made or received.	☐	
If we do not prepare your spouse or partner's taxation return, please provide us with details of their income.	☐	
Have there been any changes to your family circumstances, including a change in responsibility for your dependent child(ren), you have married, separated or otherwise changed your family circumstances? If so, please provide details.	☐	
Do you share custody of your child(ren) with anyone other than your partner? If so, please provide details.	☐	
Did you work on average less than 20 hours per week if single or did you and your spouse / partner combined work less than 30 hours per week? If so, please provide details.	☐	

Additional income information - Working for Families Tax Credits

You are required to supply details of income received from the following sources:

- Salary exchanged for private use of a work ☐
- Vouchers and other short-term charge facilities ☐
- Major shareholder in a close company ☐
- Non-locked-in PIE income ☐
- Certain pensions and annuities ☐
- Distributions from retirement savings schemes ☐
- Distributions from superannuation schemes ☐
- Tax-exempt overseas pensions ☐
- Tax-exempt salary or wages ☐
- Other income (if you or your partner get more than $5000 per year to help with your living costs) ☐ ☐
- Children's passive income ☐
- Non-resident spouse or partner's income ☐
- Non-beneficiary distributions from a trust ☐
- Non-resident borrower's overseas income ☐
- Losses ☐
- Settlor's attributable trustee income ☐
- Attributable fringe benefits ☐
- Main income equalisation scheme deposits ☐
- Main income equalisation scheme refunds ☐
- Retirement savings schemes contributions ☐
- Income from a retirement savings or superannuation scheme PIE ☐
- Depreciation recovered on sale of a building ☐

A detailed description and examples of above income types is available from the IRD website: https://www.ird.govt.nz/income-tax/income-tax-for-individuals/adjust-your-income/types-of-income		
Residential Land Withholding Tax		
Have you sold residential property in New Zealand where Residential Land Withholding Tax has been deducted and paid to the IRD? If so, provide details e.g. IR1100 Residential land withholding tax return and other sale and purchase documents.	☐	
Residential Property Sales		
Have you sold any residential property during the year (not otherwise detailed on the information provided)?	☐	
If yes, when was the property purchased?		______________________
If it was purchased within 10 years of the sale date,		
• what was the original purchase price		$ ______________________
• and the sale price?		$ ______________________
• has it been used as your main home for the full time it has been owned? If not, please provide dates and details on the nature of the shared use.	☐	
Cryptoassets		
Have you received or traded in cryptoassets during the income year? If so, please provide the following information: • The type of cryptoasset • For each transaction provide the date, type of transaction i.e. received or disposed of, number of units, value in NZD • Total units of each cryptoasset held at the beginning and end of the year • Exchange records and bank statements • Wallet addresses	☐	

Thank you for completing this questionnaire
Don't forget to sign it

Smith Mitchell
CHARTERED ACCOUNTANTS