

## 2018 INDIVIDUAL & SELF EMPLOYED TAX RETURN (IR3) QUESTIONNAIRE

**NAME:**

**Balance Date:**

**Please update your contact details below if there have been any changes:**

**Phone:**

**Fax:**

**Mobile:**

**E-mail:**

**Postal address:**

Please take the time to work through this questionnaire thoroughly and action each point that is applicable to you. This will greatly assist us in the efficient preparation of your income tax return.



### **Terms of Engagement**

This engagement is subject to Mackay Bailey Limited's current Terms of Engagement which are available on our website: [www.mackaybailey.co.nz/engagement](http://www.mackaybailey.co.nz/engagement)

By signing this page you accept responsibility for all information provided to us and agree to our Terms of Engagement.

### **Authority to Act and Obtain Information**

We may use this authority to obtain additional information should we require it to complete this engagement.

I authorise Mackay Bailey to obtain any financial records necessary to complete my annual report and tax returns for the 2018 year. This may include, but is not limited to, bank statements, co-operative statements, insurance invoices as well as dividend and interest certificates.

I authorise Mackay Bailey to be my Inland Revenue Tax Agent for all tax types and communicate with Inland Revenue on my behalf, including communicating via electronic methods.

I authorise Mackay Bailey to communicate with financiers, banks, solicitors and other advisors as they deem appropriate to obtain information necessary to carry out this engagement.

**Signature:** \_\_\_\_\_

**Full Name:** \_\_\_\_\_

**Date Completed:** \_\_\_\_\_

**INCOME**

Income from the following sources will be supplied directly to us by the Inland Revenue:

- Wages
- Salary
- NZ Superannuation
- Veterans Pension
- Taxable New Zealand Income Support Benefits
- Accident Compensation Payments
- Family Support
- Workplace Insurance

Expenses incurred in earning withholding income can be claimed (where they have not been reimbursed). Please provide full details.

**OVERSEAS INCOME**

Did you receive any income from sources outside New Zealand during the year? Yes / No

Do you own shares in a foreign company? Yes / No

Do you own units in a foreign unit trust? Yes / No

Do you have a foreign life insurance policy? Yes / No

Do you have an interest in a foreign superannuation scheme? Yes / No

If you answered yes to any of the above, please attach details.

**INTEREST AND DIVIDENDS (New Zealand and Overseas)**

Please supply us with all dividend and interest certificates, including joint investments.

Please provide full details of source and amount received. Dividend, interest and bonus certificates slips are required to show interest withholding tax paid on your behalf and imputation tax credits available to you.

**STUDENT LOAN**

Do you have a Student Loan? Yes / No

**OTHER INCOME**

**Please supply details of any cash income**

**Rents received - please complete a separate Rental Questionnaire.**

**PARTNERSHIP, TRUSTS OR ESTATES, OVERSEAS INCOME**

If you have received income from a Partnership, Trust or Estate, please supply details and advice notes received. If the annual report is **not** being prepared by us alternatively advise us of the other Accountant's contact details.

**Name of Entity:** \_\_\_\_\_

Gross Taxable Interest Income: \$ \_\_\_\_\_ Tax Paid: \$ \_\_\_\_\_

Gross Dividends: \$ \_\_\_\_\_ Tax Paid: \$ \_\_\_\_\_

Other Income: \$ \_\_\_\_\_ Tax Paid: \$ \_\_\_\_\_

