

## 2018 NON-RESIDENT INDIVIDUAL TAX RETURN (IR3NR) 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.

**INTEREST AND DIVIDENDS** (New Zealand only)

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 issue certificates are required to show interest withholding tax paid on your behalf and imputation tax credits available to you.

**Did you have any New Zealand royalties paid or credited to you? Include any royalties from partnerships and trusts.**

Yes / No

If yes,

Name of payer	Withholding Tax	Gross Royalties
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

**STUDENT LOAN**

Do you have a Student Loan? Yes / No

**EXPENSES**

The only expenses you can claim are:

- A fee to someone completing your tax return.
- Commission on interest or dividend income (but not bank fees – they are a private expense).
- Interest on money you borrowed to buy shares or to invest – as long as the investment is expected to produce some taxable income
- Premiums on loss of earnings insurance provided any payouts from the insurance policy are taxable income.

Are you able to claim for any expenses paid during the year? Yes / No

If yes, attach details.

