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2019 SALARY AND WAGE EARNERS QUESTIONNAIRE (PTS)

NAME:

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, action each point that is applicable to you. This will greatly assist us in the efficient calculation of your tax position.



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

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 2019 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.

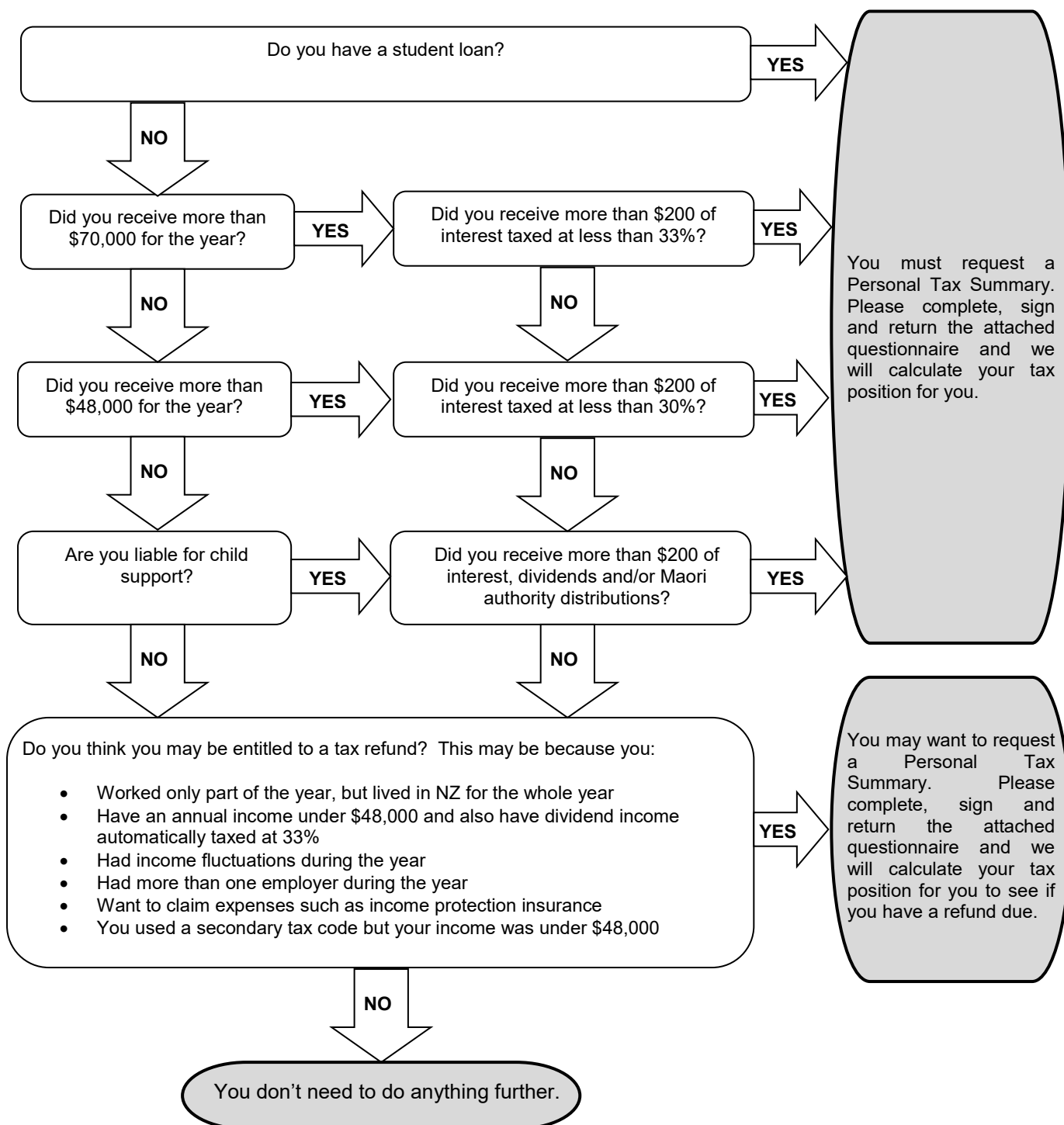
Signature: _____

Full Name: _____

Date Completed: _____



Do you require a Personal Tax Summary (PTS)?





INCOME

The following income information will be supplied directly to our office by Inland Revenue:

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

NEW ZEALAND INTEREST AND DIVIDENDS

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.

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.

WORKING FOR FAMILIES TAX CREDITS

If you believe you are entitled to Working for Families Tax Credits (WFFTC), please download and complete the supplementary questionnaire from our website or contact us to request a copy.

TAX CREDITS FOR DONATIONS

- Total amount of your Donations to Charities \$ _____
(Please staple your donation receipts to the back of this form)

- Enter the bank account number you would like your rebate and any tax refund to be direct credited to
(The Inland Revenue may also transfer the rebate credit against any tax arrears you have.)

Bank	Branch	Account Number													Suffix				

Thank you for completing this questionnaire. Please sign where indicated on page 2.