



smart business centre
Not Your Ordinary Accountants

Individual Questionnaire

This questionnaire is for individuals.

NAME _____

TRADING NAME _____

ADDRESS _____

SUBURB _____ CITY _____

POSTCODE _____ COUNTRY _____

PHONE NUMBER _____

EMAIL _____

This email address will be used for all tax returns, invoices, tax notifications, and communication.

The following questions collect the information we require to complete the tax return. Please provide as much information as possible. By submitting this form, you are confirming that all information supplied by you is complete and correct at the time of submission. We will utilise the information provided to complete your financial statements and/or tax returns.

INTEREST OR DIVIDENDS

Did you receive any funds, pension, interest, or dividends from overseas sources?

No Yes If yes provide documents relating to overseas income.

SHAREHOLDER SALARIES

Did you receive any shareholder salaries from a business where SBC does not prepare the tax return?

No Yes If yes provide documents in relation to any shareholder salary issued.

TRUSTS

Did you receive any income from a trust that SBC does not prepare the tax return?

No Yes If yes please provide details in relation to any trust income issued.

PARTNERSHIP

Did you receive any income from a partnership that SBC does not prepare the tax return?

No Yes If yes please provide in relation to any partnership income issued.

RENTAL INCOME

Do you have a portion of rental profit or loss that needs to be included in your personal tax return that Smart Business Centre would not be aware of?

No Yes If yes please provide Do you have a portion of rental profit or loss that needs to be included in your personal tax return that Smart Business Centre would not be aware of?

DONATIONS

Did you make any donations for the year ending 31 March?

No Yes If yes please provide receipts for all donations.

If you would like your bank account number with IRD updated for donation rebates, please enter it below. ____ / ____ / _____ / ____

PORTFOLIO INVESTMENT ENTITIES (PIE)

Did you receive any income from portfolio investments (excluding Kiwisaver)?

No Yes If yes please provide any income from portfolio investments (excluding Kiwisaver)?

TAX RESIDENCY STATUS

Were you a non-resident at any time during the income tax year?

No Yes If yes please provide details, including arrival and departure dates.

ADDITIONAL INFORMATION

Is there anything else you would like us to know? _____