

Individual Questionnaire – 31 March 2026



Ensure this questionnaire is completed and included with your records

Client Name		Phone:	
Balance Date	31/03/2026	Email:	

To: Su & Co Chartered Accountants Limited

Terms of Engagement

I hereby instruct you to prepare our Taxation Returns for the 2026 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. I understand that you will rely upon the information provided by me. It is my responsibility to ensure the content or accuracy of any Tax Returns that you prepared on my behalf as they will be prepared based on information that I provide to you. I understand that during preparation of the Taxation Returns you will not be specifically investigating non-compliance with laws and regulations – however should anything come to light of this nature during this process, you will bring that to my attention.

I understand that the Taxation Returns are prepared for my own use and to determine my taxation liabilities. If this should change in any material respect, I will inform you immediately. You will not accept any responsibility to any person, other than me for the contents of the Tax Returns.

All other terms and conditions of this engagement are the same as those referred to in the original Engagement Letter I signed when I became a client.

I accept that payment for the services provided is required on the 20th of the month following completion of the engagement. I also accept that should I/we default on payment Su & Co Chartered Accountants Limited will charge interest on overdue accounts at the rate of 1.5% per month, and I accept that if Su & Co Chartered Accountants Limited is required to obtain a debt collection agency to recover the costs, any costs incurred by the agency in the course of collection of outstanding monies including commissions will be on charged to me. I agree to personally indemnify Su & Co Chartered Accountants Limited for fees outstanding.

I agree that ownership of the work is retained by Su & Co Chartered Accountants Limited until payment has been made in full.

I give you full authority to:

- Access and change information from the IRD for all tax types; this may be via telephone, in writing, via internet access, MyIR or info express;
- Access and change information through myACC for Business and/or directly with ACC staff;
- Verify financial information held by other parties, including: my bankers, solicitors, finance companies and all government agencies etc;
- This also relates to any prior financial years.

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.

Signature _____

Date _____

**Thank you for completing this questionnaire
Please don't forget to sign it**

Records Required	✓	Comments																																	
Wages/National Superannuation/Benefits																																			
Please provide us with the names of any organisations you have received the following from: <ul style="list-style-type: none"> ▪ Wages ▪ 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.	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>																																		
Student Loan																																			
Do you have a student loan? If so, please provide your latest statement from IRD	<input type="checkbox"/>																																		
Interest / Dividend / PIE Income																																			
Supply copies of all certificates or details of interests, dividends and /or PIE income received, including investment portfolio reports.	<input type="checkbox"/>																																		
Rental and Leased Property																																			
Please complete the attached rental questionnaire	<input type="checkbox"/>																																		
Home Office Expenses																																			
If part of your home is set aside principally for use as an office/workshop/storage area, please provide the following details:																																			
<table border="0" style="width: 100%;"> <tr> <td style="width: 80%;">Power</td> <td style="width: 20%;">\$ _____</td> </tr> <tr> <td>Insurance (Building & Contents)</td> <td>\$ _____</td> </tr> <tr> <td>Interest (House Mortgage)</td> <td>\$ _____</td> </tr> <tr> <td>Rates (including regional council rates)</td> <td>\$ _____</td> </tr> <tr> <td>Rent</td> <td>\$ _____</td> </tr> <tr> <td>Internet</td> <td>\$ _____</td> </tr> <tr> <td>Body Corporate Fees</td> <td>\$ _____</td> </tr> <tr> <td>Landline Rental</td> <td>\$ _____</td> </tr> <tr> <td>Repairs & Maintenance</td> <td>\$ _____</td> </tr> <tr> <td>Other</td> <td>\$ _____</td> </tr> <tr> <td>Total</td> <td>\$ _____</td> </tr> </table>	Power	\$ _____	Insurance (Building & Contents)	\$ _____	Interest (House Mortgage)	\$ _____	Rates (including regional council rates)	\$ _____	Rent	\$ _____	Internet	\$ _____	Body Corporate Fees	\$ _____	Landline Rental	\$ _____	Repairs & Maintenance	\$ _____	Other	\$ _____	Total	\$ _____	<table border="0" style="width: 100%;"> <tr> <td style="width: 60%;">Cost of House and Section</td> <td style="width: 40%;">\$ _____</td> </tr> <tr> <td>Cost of Section</td> <td>\$ _____</td> </tr> <tr> <td colspan="2">Construction materials: (timber, brick, etc):</td> </tr> <tr> <td colspan="2">_____</td> </tr> <tr> <td>Area used for Business:</td> <td>_____ m²</td> </tr> <tr> <td>Total Area of House & Workshop:</td> <td>_____ m²</td> </tr> </table>	Cost of House and Section	\$ _____	Cost of Section	\$ _____	Construction materials: (timber, brick, etc):		_____		Area used for Business:	_____ m ²	Total Area of House & Workshop:	_____ m ²
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Total Area of House & Workshop:	_____ m ²																																		
Partnerships, Look Through Company, Trusts, Estates and Companies (only if not completed by Su & Co)																																			
Please supply a copy of completed annual accounts and tax returns for the current year for any entity you have an investment in.	<input type="checkbox"/>																																		
Employee Share Purchase Arrangements																																			
Did you participate in an Employee Share Purchase Scheme or Arrangement operated by your present or past employer? If Yes, please provide the following: <ul style="list-style-type: none"> • Full details of the plan and any shares issued to you, any share option you have received and proceeds from the sale of those options. • The Market Value of the shares when they vested with you. • Details of any amounts paid by you for the shares. • The date the tranche of shares was granted to you pending future vesting. • The date the tranche of shares vested with you. 	<input type="checkbox"/>																																		

Donations, Housekeeping and Childcare Tax Credits		
Do you want us to complete your rebate claim form? Yes <input type="checkbox"/> No <input type="checkbox"/> If so, please supply all donation receipts.		
Claimable Expenses		
Attach details: Income Protection/ Disability Insurance Policy – provide details of premiums and claims.	<input type="checkbox"/>	
Land Transactions		
Please provide details if you have acquired / disposed, developed (or developing), subdivided (or subdividing) or traded any property or land during the year	<input type="checkbox"/>	
Brightline Test - Purchase of Residential Property		
If this was your main home, we do <u>not</u> need any details.		
Did you purchase any Residential properties during the period from 1 April 2025 to 31 March 2026?	<input type="checkbox"/>	
If yes , please provide:		
• Solicitors Settlement Statement, including copy of legal fees invoice	<input type="checkbox"/>	
• Sale and Purchase Agreement	<input type="checkbox"/>	
• Loan details for property purchased	<input type="checkbox"/>	
• A copy of the latest Rateable Valuation	<input type="checkbox"/>	
• A list of chattels and their value for properties bought during the year (if done)	<input type="checkbox"/>	
Did the property receive the Code of Compliance Certificate (CCC) on or after 27 March 2020 ?	<input type="checkbox"/>	
If yes , please provide a copy of the Code of Compliance Certificate (CCC)	<input type="checkbox"/>	
Brightline Test - Sale of Residential Property		
Did you sell any residential properties during the period from 1 April 2025 to 31 March 2026?	<input type="checkbox"/>	
If yes , please provide:		
• Solicitors Settlement Statement, including copy of legal fees invoice and Agent Commission invoice	<input type="checkbox"/>	
• Sale Agreement	<input type="checkbox"/>	
• Purchase Agreement if it was purchased after 29 March 2018	<input type="checkbox"/>	
• Closing loan statements for property sold	<input type="checkbox"/>	
• A copy of the latest Rateable Valuation	<input type="checkbox"/>	
• A list of chattels and their value for properties sold during the year (if done)	<input type="checkbox"/>	

Working for Families Tax Credits and Parental Tax Credit

<u>Child's Name</u>	<u>IRD No.</u>	<u>Date of Birth</u>	<u>Date left School</u>
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

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

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.

