

2022 PERSONAL TAXATION QUESTIONNAIRE

Name: _____ Phone Number: _____
 Email Address: _____ Mobile Number: _____

**Your time and effort in completing this form is much appreciated
by the team at Vision Accounting Solutions Ltd.**

	YES	NO	Docs/Certs Enclosed:
1. Did you receive any of the following types of income? - Salary, Wages or Accident Compensation payments - A benefit of any sort, NZ Superannuation or Family Support (WFFTC) - Withholding Payments (also known as Scholar Income) <i>There is no need to supply documentation for this income, as IRD will provide it</i>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	
2. Did you receive any NZ interest, dividends, KiwiSaver or PIE income?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Did you receive any rental income? Please complete separate questionnaire	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Are you a shareholder or director of a company that Vision Accounting Solutions Ltd does not act for (excluding shareholdings in publicly listed companies)? If you have a salary or dividend from this company, please supply details.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Did you receive any income from an Estate, Trust, Partnership or other Business that Vision Accounting Solutions Ltd does not act for?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. Did you receive any income from overseas (including interest and dividends)?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. Did you have any interests in a Foreign Superannuation Scheme?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. Did you hold an interest in a Foreign Investment Funds including unit trusts or life insurance policy offered or entered into outside of NZ?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9. Did you hold an income interest of 10% or more in a Foreign Company? <i>(We will need to know more about the nature of your involvement in the business activity)</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10. Have you purchased, sold, or traded in Cryptocurrency (e.g. Bitcoin, Ethereum)? <i>(we will need the trading/investment reports/transactions)</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11. Did you receive any of the following types of income? - Income from the sale of any shares, bonds or other investments? - Income from any pension, annuity or superannuation scheme? - Any other income (for example royalties)? - Government Wage Subsidies?	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
12. Did you incur any expenses relating to earning your income? - Fees paid to investment adviser - interest on funds borrowed to invest in an income producing asset - Income protection insurance (Indemnity Policy only)	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
13. Did you make any donations to charitable organisations or schools during the year? Please supply receipts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
14. Are you eligible for or receiving Family Assistance - Working for Families?	<input type="checkbox"/>	<input type="checkbox"/>	
15. Do you have a Student Loan?	<input type="checkbox"/>	<input type="checkbox"/>	
16. Are you entitled to the four year temporary tax exemption on certain types of foreign income? This may apply if you are a new migrant, or a New Zealander returning to NZ after being non resident for 10 years or more. If so, please provide the date of entry into NZ. Date _____	<input type="checkbox"/>	<input type="checkbox"/>	
17. Do you have any foreign bank accounts? Or hold foreign currency accounts in NZ? If yes, please provide all bank statements.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
18. IN ALL CASES, PLEASE ENTER YOUR BANK ACCOUNT DETAILS AT SECTION A2	<input type="checkbox"/>		
19. IN ALL CASES, PLEASE SIGN THE DECLARATION AT A3	<input type="checkbox"/>		

