

2024 PERSONAL TAXATION (NON RESIDENT) 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 <u>from New Zealand</u> ? - Salary, Wages or Accident Compensation payments - A benefit of any sort, NZ Superannuation or Family Support (WFFTC) - Withholding Payments (also known as Schedular 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 NZ rental income? Please complete separate questionnaire	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Are you a shareholder or director of a New Zealand 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 a New Zealand 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 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"/>
7. 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 (only an Indemnity Policy can be claimed, supply notice from insurance company showing claimable part of premium)	<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"/>
8. PLEASE ENTER YOUR BANK ACCOUNT DETAILS AT SECTION A2			
9. PLEASE ENTER YOUR TIN (TAX IDENTIFICATION NUMBER) AT SECTION A3			
10. IN ALL CASES, PLEASE SIGN THE DECLARATION AT A4			

A1 General

1. If there are any other matters, not included above which you feel might be relevant in determining your tax position, please note them here:

A2 Bank Account Details

Inland Revenue no longer issues refunds by cheque. Refunds can be paid directly into your bank account. Please provide us with your preferred bank account details:

Bank Account Number:

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A3 Tax Identification Number

As part of the tax treaties NZ has in place with other countries, it is now necessary to disclose your overseas tax number in your NZ tax return. Some countries do not issue TIN or IRD numbers to individuals, and if this applies to you please indicate this below.

Country IRD / TIN / Tax Number:

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A4 DECLARATION

I accept responsibility for all records and information supplied to you for the purpose of preparing my Income Tax return. I accept responsibility for any failure by me to supply all relevant records and information to you.

I hereby authorise Vision Accounting Solutions Ltd to obtain from any third party any records or information you require for the purpose of preparing my Income Tax Return and accordingly any such third party is authorised to provide you with information required.

Accident Compensation Corporation

I authorise Vision Accounting Solutions Ltd to act as my agent for ACC levy purposes for all associated entities. This authorisation allows Vision Accounting Solutions Ltd to query and change information on my ACC levy account(s) through ACC staff, and through ACC Online Services. This authority will also allow Vision Accounting Solutions Ltd's main representative discretion to delegate access to my ACC information to other members of Vision Accounting Solutions Ltd. Other delegated members of Vision Accounting Solutions Ltd will also be able to query and change information on my ACC levy account.

Signed: _____

Date: _____