

2026 Personal Tax Questionnaire

for the income tax year starting 1 April 2025 to 31 March 2026

Please ensure you sign and return this questionnaire with all relevant information. Please mark the ENCLOSED box to confirm information is enclosed. If question is not applicable please mark the N/A box.

Note: Incomplete information will result in a delay in starting your accounts and may increase costs to you.

Name: _____

A RESIDENCY ENCLOSED N/A

- | | | | |
|-----------------|--|-----------------------|-----------------------|
| 1. | ARE YOU A NEW OR RETURNING NZ RESIDENT?
Please provide us with your departure/arrival details from/to NZ | <input type="radio"/> | <input type="radio"/> |
| 2. | HAVE YOU LEFT NZ PERMANENTLY OR FOR AN EXTENDED PERIOD?
Please provide us with your departure details from NZ
Have you completed any IRD Tax Residency Questionnaire? If so please provide copy
PLEASE CONTACT US IMMEDIATELY IF YOU ARE PLANNING TO LEAVE NZ FOR AN EXTENDED PERIOD | <input type="radio"/> | <input type="radio"/> |
| 3. | ARE YOU A SETTLOR/TRUSTEE/BENEFICIARY OF ANY OVERSEAS TRUSTS/ESTATES?
Please provide details of the Trust/Estate | <input type="radio"/> | <input type="radio"/> |
| 4. | HAVE YOU SOLD ANY PROPERTY (INCLUDING NON RENTAL) PURCHASED ON OR AFTER 29 MARCH 2018?
Please provide details of property sales
(Including sale and purchase agreements, settlement statements and valuation) | <input type="radio"/> | <input type="radio"/> |
| \$ _____ | | | |
| 5. | HAVE YOU PURCHASED ANY PROPERTY (INCLUDING FAMILY HOME) ON OR AFTER 27 MARCH 2021?
Please provide details of property purchases
(Including sale and purchase agreements, settlement statements and valuation) | <input type="radio"/> | <input type="radio"/> |
| \$ _____ | | | |

B NEW ZEALAND INCOME ENCLOSED N/A

- | | | | |
|-----------------|--|-----------------------|-----------------------|
| 6. | EMPLOYMENT INCOME
Income with PAYE/Withholding Tax deducted | <input type="radio"/> | <input type="radio"/> |
| \$ _____ | | | |
| | Redundancy payment received
(Please attach letter from employer) | <input type="radio"/> | <input type="radio"/> |
| \$ _____ | | | |
| 7. | INTEREST RECEIVED
Please provide Resident Withholding Tax Certificate | <input type="radio"/> | <input type="radio"/> |
| \$ _____ | | | |
| 8. | DIVIDENDS RECEIVED
Please provide dividend statements (including power company dividend) | <input type="radio"/> | <input type="radio"/> |
| \$ _____ | | | |
| 9. | PORTFOLIO INVESTMENT ENTITY (PIE) INCOME
Please provide PIE statements | <input type="radio"/> | <input type="radio"/> |
| \$ _____ | | | |
| 10. | TRUST/ESTATE INCOME
Please provide trust/estate name and details | <input type="radio"/> | <input type="radio"/> |
| \$ _____ | | | |
| 11. | RENTAL INCOME
Please complete separate Property Investment Questionnaire | <input type="radio"/> | <input type="radio"/> |
| \$ _____ | | | |

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12. PARTNERSHIP/BUSINESS INCOME

Please complete separate Business Questionnaire

\$

13. SHAREHOLDER SALARY/LTC LOSSES

Please advise name of companies & provide copy of financial statements

\$

14. OTHER NZ INCOME

Please provide details

(E.g. share trading, Government stock, etc.)

\$

15. ARE YOU ENTITLED TO PARTICIPATE IN ANY EMPLOYEE SHARE OPTIONS OR SIMILAR INCENTIVE SCHEMES?

Please provide details

\$

C OVERSEAS INCOME

ENCLOSED N/A

16. OVERSEAS SALARY/CONSULTANCY FEES

Please provide details

\$

17. OVERSEAS RENTAL INCOME

Please complete separate Property Investment Questionnaire

\$

18. OVERSEAS INTEREST RECEIVED

Please provide interest certificates

\$

19. OVERSEAS DIVIDENDS RECEIVED

Please provide dividend statements

\$

20. OVERSEAS PENSION PAYMENTS RECEIVED

Please provide details of payments

\$

21. OVERSEAS SHARES/SUPERANNUATION/LIFE INSURANCE POLICIES

Please provide details including:

Cost of investments (including premiums and other contributions) Purchase/contribution and sale/
distribution details

Market values as at 01/04/2025 and 31/03/2026 Investment advisor reports and their contact details

\$

C EXPENSES

ENCLOSED N/A

22. INCOME PROTECTION AND DISABILITY POLICIES

Please provide invoice/year end tax statement (Note "agreed value" policies are not deductible)

\$

23. MANAGEMENT FEES ON SHARE PORTFOLIO

Please provide invoices

\$

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24. INTEREST PAID IN RELATION TO INVESTMENTS

Please provide interest summaries

\$

E TAX REBATES/FAMILY ASSISTANCE

ENCLOSED N/A

25. CHARITABLE DONATIONS/PUBLIC SCHOOL FEES

Please provide original receipts

\$

26. HOUSEKEEPER/CHILDCARE REBATE

Please provide original receipts

\$

27. FAMILY ASSISTANCE

Have you received any family assistance payments this year

(This includes Working for Family Tax Credits and Independent Earner Credits)

 Y N

F OTHER INFORMATION

ENCLOSED N/A

28. STUDENT LOAN

Please provide details of any voluntary payments

\$

Would you like overpayments refunded or applied to the loan?:

G HOW WOULD YOU LIKE YOUR TAX REFUNDS

Direct credit to nominated bank account as follows

(Please include bank account holder name as well as numbers)

Transfer to offset other tax or future tax payable

Transfer to other related party

Name & IRD number of other related entity

Offset against outstanding accounting fees

H HOW WOULD YOU LIKE TO SEND US YOUR DOCUMENTS

via Email

Hard Copy

I HOW WOULD YOU LIKE TO RECEIVE YOUR COMPLETED DOCUMENTS

Collect documents from PKF Withers Tsang office

Collect documents and meet with accountant/partner to review the results

Courier to home/office address

Post to home/office address

Email and post copies to home/office address

(Please note we are not responsible for any loss of documents sent via courier or post and a courier (signature required) must be used if package is too large for standard NZ postal delivery)

Name:	Signature:		
Email:	Phone:		
Postal Address:			Date:

PLEASE REMEMBER TO COMPLETE THE TERMS OF ENGAGEMENT