



2026 Personal Questionnaire

Client Name: Balance Date 31 March 2026

Have any of your contact/email details changed? If so, please provide to us.

Please answer all questions. As the information provided will be used for tax purposes it is important all information supplied is accurate and complete. If you have any queries, please contact us.

TO: Hayward & Co. Chartered Accountants Ltd

Terms of Engagement

I hereby instruct you Hayward & Co Chartered Accountants Ltd and staff/contractors as applicable to prepare my 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.

Authority is given to obtain information from Inland Revenue, other government agencies and financial institutions about all tax types (except child support), bank and loan accounts in order to complete the above assignments. This includes obtaining information through all Inland Revenue media and communication channels including electronic ones.

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

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.

I also accept that you have the right to charge interest on overdue accounts at the rate of 2.0% per month, and that all accounts are due for payment by the 20th of the month following invoice date. The charging of such interest will be at your discretion. I accept that any collection costs you incur will be fully recoverable from me.

It is the nature of accountancy work that most financial statement preparation work arrives in the office at one time. We process work received on a "first come, first served" basis, however we will endeavour to meet any requests for work to be completed urgently.

.....
Client's signature

.....
Date



Please answer all questions. As the information provided will be used for tax purposes it is important that all information supplied is accurate and complete. If you have any queries, please contact us.

INCOME AND EXPENSES	Yes	No
<p>Wages and Salary</p> <p>We received a summary of earnings from IRD, please list employer to enable us to check these details. <i>In most cases IRD will have sent us these details direct, however we do need to check all details have been included.</i></p>	<input type="checkbox"/>	<input type="checkbox"/>
<p>Interest</p> <p>Please attach or email all RWT certificates (we will also pull data extracted from IRD)</p>	<input type="checkbox"/>	<input type="checkbox"/>
<p>Dividends</p> <p>Please attach or email all dividend advice certificates. This includes share issued in lieu of cash dividends. We will also pull data extracted from IRD</p>	<input type="checkbox"/>	<input type="checkbox"/>
<p>Inland Revenue Data Confirmation</p> <p>Do you confirm that all income in your IRD (MyIR) account has been included?</p>	<input type="checkbox"/>	<input type="checkbox"/>
<p>Foreign/Overseas Income</p> <ul style="list-style-type: none"> • Supply details of overseas interest, dividends, wages received, any other income, and taxation paid • Provide details of any overseas investments held at any time during the financial year • Attach all of your investments advisor's reports • Have you at any point in your lifetime, ever contributed to a foreign superannuation scheme, even if you cannot receive the benefits until you retire? <p>Note: New Zealand residents are liable for tax on all world-wide income, i.e. ISA investments</p>	<input type="checkbox"/>	<input type="checkbox"/>
<p>Overseas Income/Investments</p> <p>Do you have more than \$50,000 (cost price) invested in shares in companies, other than those listed on the NZ and Australian stock exchanges. If YES, we require cost of the investment and market value at start and end of year.</p>	<input type="checkbox"/>	<input type="checkbox"/>
<p>Overseas Investments – continued</p> <p>Do you hold any investments in overseas companies, managed funds, foreign superannuation schemes, or life insurance policies? If yes, please provide a summary of these investments, including their market value at the start of the financial year.</p>	<input type="checkbox"/>	<input type="checkbox"/>
<p>Unit Trusts</p> <p>Please attach or email all advice notices.</p>	<input type="checkbox"/>	<input type="checkbox"/>
<p>Other income</p> <p>Please provide details of any other income; attach details:</p> <ul style="list-style-type: none"> • Income Replacement Insurance Policy – provide details of premiums and claims • Did you receive non-taxable income from any other sources? If Yes, please provide 	<input type="checkbox"/>	<input type="checkbox"/>
<p>Losses from Look Through Company (LTC) – (if not prepared by us)</p> <p>Company name: _____ IRD Number: _____</p> <p>Share of Loss \$ _____ OR Copy of financial statements and tax return prepared</p>	<input type="checkbox"/>	<input type="checkbox"/>
<p>Rental Income information</p> <p>Please provide the following:</p> <ul style="list-style-type: none"> • Bank statements or summary of rental income and expenses. • Details on expenses incurred during the year (insurance, rates, interest, R&M etc) • Gross rental receipts - Solicitor Statements of any rental property purchased or sold 	<input type="checkbox"/>	<input type="checkbox"/>
<p>Share of Partnership income (if not prepared by us)</p> <p>Partnership name: _____ IRD Number: _____</p> <p>Share of profit/ (loss) \$ _____ Share of tax credit \$ _____</p>	<input type="checkbox"/>	<input type="checkbox"/>

Share of Trust income (if not prepared by us) <input type="checkbox"/> <input type="checkbox"/> Trust name: _____ IRD number: _____ Share of profit \$ _____ Share of tax credits \$ _____ Distributions \$ _____
Platform / Gig Economy Income <input type="checkbox"/> <input type="checkbox"/> Did you or your business earn any income through a digital platform or app during the year? This includes, but is not limited to: <ul style="list-style-type: none"> • Short-stay accommodation (e.g., Airbnb, Booking.com, Bookabach), Ride-sharing or transport (e.g., Uber, Ola) , Food delivery (e.g., Uber Eats) • Personal or professional services (e.g., Upwork, Fiverr, Airtasker) <i>If yes, please provide details of the platforms used and total gross income from each.</i>
Cryptoassets <input type="checkbox"/> <input type="checkbox"/> Have you received or traded in cryptoassets during the income year? If so, please provide the following information: <ul style="list-style-type: none"> • The type of cryptotasset • For each transaction provide the date, type of transaction, i.e. received or disposed of, number of units, value in NZD • Total units of each cryptoasset held at the beginning and end of the year • Exchange records and bank statements • Wallet addresses
Overseas Travel & Remote Work <input type="checkbox"/> <input type="checkbox"/> Have you spent more than 183 days in New Zealand during any 12-month period ending in this tax year? If you are a non-resident, did you perform any work remotely for an overseas employer or client while physically present in New Zealand? If yes to either, please provide details of your travel dates and work arrangements.
Donation rebate <input type="checkbox"/> <input type="checkbox"/> If you wish to complete your claim, please provide all donation receipts
Deductible expenses <input type="checkbox"/> <input type="checkbox"/> Please provide full details of any expenses incurred in deriving income from sources other than employment. Please attach supporting documents to substantiate expenses. <u>Types of expenses:</u> Income protection insurance \$ _____ Commissions \$ _____ Interest paid on funds borrowed for businesses \$ _____
OTHER (if applicable) Yes No
Student Loan <input type="checkbox"/> <input type="checkbox"/> Please advise if you had a student loan during the year If yes were you overseas for more than 183 days? <input type="checkbox"/> <input type="checkbox"/>
Tax Residency <input type="checkbox"/> <input type="checkbox"/> Were you a New Zealand tax resident for the full year? If no, provide dates and countries.....
Brightline rules – Residential property for property bought or sold after 1 October 2015 <input type="checkbox"/> <input type="checkbox"/> Please advise if you have purchased/sold property which may be subject to Brightline rules which may require completion of IR833 form with your return.

