

Individual Questionnaire – 31 March 2025

Name	Phone
Address	Mobile
	Email

Bank Account number for Refunds

Information Required	Yes, No, N/A, Comment
Interest and Dividends Received	
Please provide all dividend statements (including shares in lieu and bonus shares), interest certificates and PIE tax statements for the year.	
Overseas Income Details	
Details of all overseas income and tax deducted from this at source.	
Details of any other income	
Please provide this even if you are unsure as to whether an amount is taxable.	
Income Protection Insurance	
Please provide the letter from your income protection insurance provider regarding payments made for the year.	
Donations	
If you would like us to also prepare your donations rebate please include all donation receipts for the year	
Working for Families	
If your combined income is below a certain level you may be entitled to working for families. If you are not yet registered or there are any changes to your family circumstances during the year please provide details.	

Thank you for completing this questionnaire. Please sign and return with your information.

Signature _____

Date _____