

## Individual Questionnaire – 31 March 2026

We are able to view all income with tax deducted in NZ through the IRD. We only require additional income and donations not provided to the IRD per below.

<b>Name</b>		<b>Phone</b>	
<b>Address</b>		<b>Email</b>	

Information Required	Details
<b>Overseas Income Details</b>	
Please provide details of all overseas income and tax deducted from this at source.	<input type="checkbox"/> refer to attached <input type="checkbox"/> N/A Notes:
<b>Details of Any Other Income</b>	
Please provide details of any other income not already provided to the IRD, even if you are unsure whether it is taxable.	<input type="checkbox"/> refer to attached <input type="checkbox"/> N/A Notes:
<b>Income Protection Insurance</b>	
Please provide the annual statement or letter from your income protection insurance provider regarding payments made for the year.	<input type="checkbox"/> refer to attached <input type="checkbox"/> N/A Notes:
<b>Donations</b>	
If you would like us to also prepare your donation tax credit claim, please include all donation receipts for the year.	<input type="checkbox"/> refer to attached. <input type="checkbox"/> N/A Notes:

Thank you for completing this questionnaire.  
 Please sign and return it with your supporting information. By signing, you confirm that the information provided is true and correct to the best of your knowledge and that you are responsible for the accuracy and completeness of the information provided.

<b>Signature</b>		<b>Date</b>	
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