

Individual Questionnaire 2024

Ensure this questionnaire is completed and included with your records

Client Name: _____

To: Drive Accounting

Terms of Engagement

I hereby instruct you to prepare my Taxation Return for the 2024 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. You are hereby authorised to communicate with my bankers, solicitors, finance companies and all government agencies to obtain such information as you require in order to carry out the above assignments.

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.

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 ACC Online Services. This authority will also allow your organisation's main representative discretion to delegate access to my/our 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/our ACC Levy account.

All other terms and conditions of this engagement are the same as those referred to in the most recent engagement letter signed.

Signature _____

Date _____

Tax Refunds

Please provide the bank account number that you would like any tax refunds credited into.

Bank account ___ / ___ / ___ / ___

Information Required	Yes	No
Did you receive, or believe you are entitled to receive, Working for Families payments?	<input type="checkbox"/>	<input type="checkbox"/>
Were you a outside NZ for more than 183 days during the income tax year?	<input type="checkbox"/>	<input type="checkbox"/>
Did you receive income from Salary, Wages, Withholding Tax Income or WINZ?	<input type="checkbox"/>	<input type="checkbox"/>
Did you receive income from a trust or estate? <i>If "yes", please provide income details.</i>	<input type="checkbox"/>	<input type="checkbox"/>
Did you receive income from overseas? <i>If "yes", please provide income details.</i>	<input type="checkbox"/>	<input type="checkbox"/>
Did you receive income or losses from a partnership?	<input type="checkbox"/>	<input type="checkbox"/>
Did you or will you receive shareholder salaries from businesses for which we do not prepare the financial statements for? <i>If yes, please provide details.</i>	<input type="checkbox"/>	<input type="checkbox"/>
Did you receive income from rents? <i>If "yes", provide details. If appropriate, complete our "Annual Checklist - Investment Properties".</i>	<input type="checkbox"/>	<input type="checkbox"/>
Did you receive income from interest or dividends? <i>If "yes", please provide income details.</i>	<input type="checkbox"/>	<input type="checkbox"/>
Did you have any other income? <i>If "yes", please provide income details.</i>	<input type="checkbox"/>	<input type="checkbox"/>
Did you receive losses from a look through company (LTC) for which we do not prepare the financial statements? <i>If "yes", provide supporting details.</i>	<input type="checkbox"/>	<input type="checkbox"/>
Can you claim expenses e.g. income protection insurance? <i>If "yes", attach details of the claim.</i>	<input type="checkbox"/>	<input type="checkbox"/>
Did you have an interest in a foreign company, unit trust, life insurance policy or superannuation fund? <i>If "yes", attach details of the interest in particular entity.</i>	<input type="checkbox"/>	<input type="checkbox"/>

Records Required

Home Office Expenses (if applicable)

If part of your home is set aside principally for use as an office/workshop/storage area which is used by you in relation to your rental property business, you may be able to claim a proportion of your home expenses against your rental income. Please provide the following details:

Area used for business:	_____	m ²
Total area of house and workshop:	_____	m ²
Power	\$ _____	
Phone	\$ _____	
Rent	\$ _____	
Insurance (Building and Contents)	\$ _____	
Interest (House Mortgage)	\$ _____	
Rates (including regional council rates)	\$ _____	
Repairs and maintenance	\$ _____	
Other	\$ _____	
Total	\$ _____	

Cryptoassets

Have you purchased, sold or traded in cryptoassets during the income year?

If so, please provide the following information:

- The type of cryptoasset
- 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