



## 2024 INDIVIDUAL QUESTIONNAIRE

**FULL NAME:**

*Circle Answer*

- 1 SALARY / WAGES / SUPERANNUATION / WINZ BENEFITS** Yes No N/A  
 Please indicate if you received any of the following and provide details. In most cases the IRD have sent us this information, **we only need an ESTIMATE from you**

	Employer Name	Estimated Gross Income	Estimate PAYE / WHT / Tax
Salary / Wages / or WHT Income	1. 2. 3.		
ACC			
Superannuation / WINZ			

- 2 OCCUPATION**  
 Please write in a description of your occupation \_\_\_\_\_

- 3 STUDENT LOAN** Yes No N/A  
 Do you have a student loan?  
**If so, we need you to complete an IR215 adjustment form – you can download the form from <https://www.ird.govt.nz/wff-tax-credits/ir215-form-adustbusinc-fam.html>**

- 4 INTEREST RECEIVED – Bank, PIE & KiwiSaver** Yes No N/A  
 Attach Interest certificates & RWT Certificates – while we get some details from IRD we need to check

- 5 DIVIDENDS RECEIVED** Yes No N/A  
 Attach Dividend certificates or obtain report from Link or Computershare

- 6 OVERSEAS INCOME – this section is for NZ Residents only** Yes No N/A  
 Provide details of all non-NZ income – this can include interest / dividends / life insurance policies / superannuation policies / bank accounts / shares or other investments. If you have any of these please provide full details for us to assess need to include in your tax returns

- 7 LOOK THROUGH COMPANY (LTC)** Yes No N/A  
 Please provide details of LTC income or loss (**only if NOT prepared by Evelyn Mae Ltd**)

- 8 CASH JOBS** Yes No N/A  
 Did you do any cash jobs? If yes, please provide details

- 9 OTHER INCOME DETAILS** Yes No N/A  
 Please provide details of any Business, Partnership, Rental Income (Loss), or Company income (**only if NOT prepared by Evelyn Mae Limited**)

- 10 SHARE TRADING** Yes No N/A  
 Have you been involved in share or futures trading? Supply details

- 11 LOSS OF EARNINGS / INCOME PROTECTION INSURANCE (NOT Life Insurance)** Yes No N/A  
**Please attach statement from insurance company**

**12 DONATIONS / CHILDCARE REBATE - Send original receipts NOT photocopies**

If you wish us to complete your IR526 please send in all the ORIGINAL receipts:

- a) Donations – attach **original** (not photocopies) receipts Yes No N/A  
 b) School fees – attach **original** (not photocopies) receipts Yes No N/A

**13a WORKING FOR FAMILIES TAX CREDITS (WFFTC)**

Please complete the details below if you believe there may be an entitlement Yes No N/A

Childs Full Name	Date of Birth	IRD Number	Attend School
			Yes / No
			Yes / No
			Yes / No

*IRD relies on the information you provide. You are responsible for advising IRD of any changes in your circumstances regarding partner changes, custody changes, children leaving school etc.*

*We are able to estimate your WFFTC only if you provide all the correct details, but remember it is only an estimate. Our system does NOT inform IRD of any changes - that is your responsibility.*

*If so, we need you to complete an **IR215** adjustment form – you can download the form from <https://www.ird.govt.nz/wff-tax-credits/ir215-form-adustbusinc-fam.html>*

**13b WFFTC ONLY - WEEKS & NUMBER OF HOURS WORKED**

Yes No N/A

Please indicate for each employer how many weeks worked, and average hours worked per week.

**Remember to include your own business or company on the list**

Employer Name	No. of weeks worked	Average no. of hours worked per week

**14 UPDATE CONTACT DETAILS - PLEASE complete email / phone even if you think there are no changes**

**Postal Address:**

.....  
 .....  
 .....

**Work Phone:** .....

**Home Phone:** .....

**Fax Number:** .....

**Physical Address:**

.....  
 .....  
 .....

**Cellphone:** .....

**Email:** .....

**15 CORRESPONDENCE & NEWSLETTERS** Via Email or NZ Post

**16 BANK ACCOUNT NUMBER - Please enter the account number for any tax refund if applicable**

**17 I CERTIFY THAT** the information provided in this document is true, and correct to the best of my knowledge; and that I have provided all the relevant documentation and data needed:

Signature \_\_\_\_\_

Date \_\_\_\_\_

Name in Full \_\_\_\_\_