

INDIVIDUAL TAX INFORMATION QUESTIONNAIRE 2026 INCOME YEAR

Please complete this questionnaire and provide all relevant records to enable preparation of your tax return in accordance with Inland Revenue (IRD) requirements. Not all sections will be applicable depending on your personal circumstances and sources of income. Please complete only those sections relevant to you.

1. Client Details

Name:

IRD Number:

2. Engagement & Authority

I authorise the preparation of my taxation returns and confirm that all information supplied will be complete and accurate.

Signature: _____

Date: __ / __ / 2026

3. Income Information (Tick if applicable)

- ☐ Overseas income and investments
- ☐ Partnerships, trusts, companies (not prepared by us)
- ☐ Other income (insurance claims, LTC allocations etc - not prepared by us.)

4. Student Loan

Do you have a student loan? ☐ Yes ☐ No

If yes, provide latest IRD statement.

5. Donations

Do you want us to complete your donation rebate claim? ☐ Yes ☐ No

If yes, attach receipts.

6. Working for Families / Family Information

Provide details of dependent children (name, IRD no., DOB):

Any changes to family circumstances during the year? ☐ Yes ☐ No

If yes, provide details.

7. Additional Income (if applicable)

- ☐ Trust income (undistributed / attributable)
- ☐ PIE income
- ☐ Pensions / annuities
- ☐ Other payments supporting household

8. Mixed Use Assets (if applicable)

Holiday home / Bach: ☐ Yes ☐ No

Boat / Plane (> \$50,000): ☐ Yes ☐ No

If the asset is mixed use please provide the following;

Owner Days _____

Client Days _____

9. Government Subsidies

Dates and amounts received:

10. Declaration

I confirm the information supplied is true and complete and authorise its use for taxation purposes.

Signature: _____

Date: __ / __ / 2026