

PERSONAL TAX QUESTIONNAIRE | 2024

Name: _____

Some of the following information sought may not be applicable to your tax return, and some information sought may have already been provided. Please provide details where appropriate.

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- I received wages or salary during the year.
 - I have included donation receipts for a donation rebate claim
 - I or my spouse/partner receive working for families tax credits
 - I have a student loan
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I have provided documents of:

- Dividend Statements
 - Bank Interest certificates
 - Details of any overseas Income
 - Claimable Expenses/Losses eg Income Protection Insurance
 - Any other income eg. from Estates or Trusts
 - Any Foreign Superannuation Lump Sums or Transfer schemes to NZ
 - If you have sold a property that is not your family home and owned for less than two years any profits may be taxable so please include documentation of this.
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If any of your contact details have changed please advise these below:
