

Individual Client Questionnaire

For the Year Ended 31 March 2026



Update Your Details

Business Details

Business Name:

Balance Date:

Contact Details: To ensure our records are up to date, please complete the following: **Preferred contact method**

Business Phone:

Home Phone:

Mobile:

Email:

Business Address:

Bank Account Details

Inland Revenue no longer provides the option for refunds via cheque, all tax refunds will now be paid by direct credit to a nominated bank account. It's crucial the bank account details the Inland Revenue currently hold for you are correct.

We would appreciate it if you could confirm your current bank account details by sending us a bank deposit slip or a bank statement for the relevant entities or individuals. If you can please note these below, we can then advise Inland Revenue of these details and of any changes:

Entity Name(s)

Please sign the Privacy Act authorisation on page 2.

Privacy Act Authorisation

I/We authorise Vanburwray Chartered Accountants Limited T/A Moore VBW and any employees or contractors of Moore VBW to act as our tax agent with Inland Revenue on matters relating to all tax types (except child support).

This includes authority to:

- Discuss and make enquiries verbally or in writing to Inland Revenue from time to time regarding my/our tax affairs.
- Obtain and access information via telephone, email or by online services provided by Inland Revenue.

I/We authorise any person or company to provide Moore VBW with such information as Moore VBW may require to complete the financial statements, and/or tax return(s), and any other work Moore VBW carries out on behalf of myself/ourselves.

If desirable I/we further authorise Moore VBW to furnish to any third party, information of mine/ours as Moore VBW sees fit that is requested in furtherance of our business activities.

I/We give you full authority to contact any organisation, via telephone, writing or Internet access, including banks, solicitors, the Inland Revenue Department (IRD), the Accident Compensation Corporation (ACC) and all other government agencies for the purposes of obtaining information necessary to complete the financial statements and tax return(s). I/We acknowledge that this information would not otherwise be available due to the Privacy Act restrictions, but I/we give full authority for this statement to be used as written confirmation of my/our agreement to your obtaining from any organisation for the above mentioned purposes.

I/We give you full authority to access and change information from the IRD for all tax types, this may be via telephone, in writing, Internet access or info express.

I/We authorise Moore VBW to act as my/our agent for ACC levy purposes and for all associated entities. This authorisation allows Moore VBW to query and change information on my/our ACC levy account(s) through ACC staff, and through MyACC for Business. This authority will also allow the organisation's main representative discretion to delegate access to my/our ACC information to other members of the organisation. Other delegated members of the organisation will also be able to query and change information on my/our ACC levy account(s).

I/We further authorise that all information is true and correct and is supplied under the terms pursuant to the signed Engagement letter previously issued.

Business Name:

Name:

IRD Number:

Date:

Signature:

I agree with the terms of the Privacy Act authorisation.

Questionnaire

To assist in the preparation of your annual financial statements please complete the following.

1 Other Information (Cont.)	Yes	No	N/A	Comment/Details																
A Did you make any charitable donations or pay school fees during the year?				Please provide receipts so a tax rebate can be claimed (33 cents in the dollar).																
B Do you have loss of earnings or income protection insurance? These are tax deductible.				Please provide details of any premiums paid.																
2 Investments	Yes	No	N/A	Comment/Details																
A Do you have any income derived from overseas?				Please provide details.																
B Did you earn any interest or dividends from New Zealand or overseas?				Please provide details (RWT certificates & dividend statements).																
Address: Rental Income: \$ <table border="1"> <thead> <tr> <th colspan="2">Costs</th> </tr> </thead> <tbody> <tr> <td>Interest (Please attach statements)</td> <td>\$</td> </tr> <tr> <td>Insurance</td> <td>\$</td> </tr> <tr> <td>Repairs & Maintenance</td> <td>\$</td> </tr> <tr> <td>Rates</td> <td>\$</td> </tr> <tr> <td>Agents Fees</td> <td>\$</td> </tr> <tr> <td>Phone/Internet</td> <td>\$</td> </tr> <tr> <td>Others – Please specify</td> <td>\$</td> </tr> </tbody> </table>					Costs		Interest (Please attach statements)	\$	Insurance	\$	Repairs & Maintenance	\$	Rates	\$	Agents Fees	\$	Phone/Internet	\$	Others – Please specify	\$
Costs																				
Interest (Please attach statements)	\$																			
Insurance	\$																			
Repairs & Maintenance	\$																			
Rates	\$																			
Agents Fees	\$																			
Phone/Internet	\$																			
Others – Please specify	\$																			
Did you have a rental property any rental or Airbnb income during the year? C Please provide details of income & expenses if not provided separately. 100% of interest paid on residential rental property is deductible for the 2026 year.																				
3 Bright Line Income	Yes	No	N/A	Comment/Details																
A Did you buy or sell any residential property other than your family home during the financial year?				There are rules that may tax gains on property sales under the bright line rules. Please provide details and we will contact you to discuss the circumstances and whether bright line rules apply.																
4 Cryptocurrency	Yes	No	N/A	Comment/Details																
A Did you own or have you traded cryptocurrency in the financial year?				Please provide records of all your cryptocurrency transactions and details of any crypto-related expenses.																
B If you have, did you receive any income from cryptocurrency activities?																				

5 Mixed Use Asset		Yes	No	N/A	Comment/Details
A	Do you have an asset (such as a holiday home) that is used privately, used to derive rental income, and has been vacant for part of the year?				Please provide details of the asset including how many days it was privately used.
B	Was the property empty for 62 days in the income year?				

Contact Us

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