

# OLIVE

## ACCOUNTING & BOOKKEEPING

### **2026 Individual Questionnaire**

**Client Name:**

**Phone:**

I authorise you to prepare my tax return from the information and records I have supplied to you. I accept responsibility for the accuracy and completeness of all records and information supplied to you. You are authorised to communicate with my bankers, solicitors, finance companies, and any other business that I deal with to obtain such information as you require in order to complete the above duties.

**Signature.....Date.....**

#### Information required to complete your tax return: Please tick as apply

Did you receive a salary, wages or superannuation? If so, IRD will supply the details	Yes	No
Did you receive any interest & dividends during the year? (If so, please supply details of all interest and dividends received by enclosing dividend and Interest advice slips, Portfolio Investment Entity (PIE) income etc.)	Yes	No
Did you receive any income from overseas such as pensions, dividends and FIFs? (If so, please provide full details including type of income)	Yes	No
Did you receive any other income such as estate or trust income, commissions etc? (If so, please provide details).	Yes	No
Did you receive any rental income?	Yes	No
Did you have any deductible expenses such as premiums paid on income protection insurance? (If so, please provide details).	Yes	No
Do you have any rebates to claim (School, Church or Charitable donations)? If so, please supply the receipts and details of the bank account you would like the rebate paid into.	Yes	No