



## 2025 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 <b>original</b> (not photocopies) receipts   | Yes | No | N/A |
| b) School fees – attach <b>original</b> (not photocopies) receipts | Yes | No | N/A |

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

*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. Please provide weekly hours worked for In Work Tax Credit estimate too. 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>*

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

**Postal Address:**

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**Physical Address:**

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

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

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

**Cellphone:** .....

**Email:** .....

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

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**16 BANK ACCOUNT FOR IRD REFUNDS – Name of Account, plus Account number**

\_\_\_\_\_  
Name on Bank Account eg Jo Bloggs

\_\_\_\_\_  
Bank account number in full

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**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.  
Further Evelyn Mae Ltd has authority to act on our behalf with IRD for ALL tax types:

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

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

IRD Number: \_\_\_\_\_

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