

Estate Questionnaire



Tax Year 1 April to 31 March

Name:

Executor:

ACKNOWLEDGEMENT BY CLIENT

I accept responsibility for the accuracy and completeness of the information supplied below which is to be used in the preparation of the estate income tax return.

Authorisation to Obtain Information Subject to the Privacy Act

I authorise Kendons Chartered Accountants Ltd to obtain such further information as required to complete this engagement from the appropriate bankers, solicitors, finance companies, share registries, Inland Revenue Department and other persons or organisations.

Executor's Signature: Date:

1. Summary of Earnings / Personal Tax Summary (IR544/537 or 538) to date of death

The IRD usually forwards these documents to us as your agent. If you have received any of these forms, please include them with your records.

2. Dividends / Interest Received / Portfolio

Please attach advice slips / RWT certificates / portfolio tax report and valuation.

3. Overseas Investments

Please complete the schedule below providing details of all investments held.

Name of Company	Country	No. of Shares	Cost \$NZ

4. Income From Other Sources

- Rental Property (If yes, complete Rental Property or Rental Company questionnaire attached or request one from us) YES / NO
- Estate/Trust/Partnership YES / NO
- Other YES / NO

Please supply details.

5. Solicitor Records

- a) Please supply financial ledger printout for the tax year.
- b) Please supply investment ledger printout for the tax year.

Have all estate assets been liquidated and the proceeds lodged into solicitors trust account? YES / NO

Date all assets liquidated

6. Legal Fees

Value of legal fees charged in relation to income generation

For Office Use Only

Date Recieved:

Received by:

Date of death:
(if first year)