

Schedule 7 - Investor & Other Information

Entity Name: _____

1)	Income Did you receive any income from paid wages / superannuation? If yes, the IRD will send us your Summary of Earnings automatically.	Yes	No																
2)	Rebate Information Please provide receipts for Donations made	Yes	No																
3)	Other Income Did you receive any other income, for example from estates or trusts, annuity / pensions ? If yes, attach a copy of supporting documentation <table border="0"> <thead> <tr> <th><i>Person Receiving Income</i></th> <th><i>Source / Type of Income</i></th> <th><i>Gross</i></th> <th><i>Tax Paid</i></th> </tr> </thead> <tbody> <tr> <td>_____</td> <td>_____</td> <td>\$ _____</td> <td>\$ _____</td> </tr> <tr> <td>_____</td> <td>_____</td> <td>\$ _____</td> <td>\$ _____</td> </tr> <tr> <td>_____</td> <td>_____</td> <td>\$ _____</td> <td>\$ _____</td> </tr> </tbody> </table>	<i>Person Receiving Income</i>	<i>Source / Type of Income</i>	<i>Gross</i>	<i>Tax Paid</i>	_____	_____	\$ _____	\$ _____	_____	_____	\$ _____	\$ _____	_____	_____	\$ _____	\$ _____	Yes	No
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_____	_____	\$ _____	\$ _____																
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_____	_____	\$ _____	\$ _____																
4)	Portfolio Summary Reports Do you use an investment manager or advisor? If yes, please provide a copy of any portfolio summary reports received in respect of the year.	Yes	No																
5)	New Zealand - Interest / Dividends / Portfolio Investment Entities (PIE) Income Did you receive any income from these sources? If yes, please provide advice notices	Yes	No																
6)	Overseas - Interest / Dividends / Other Income / Pensions / Superannuation Did you receive any income from these sources? If yes, please provide income distribution details We also require the following information for each shareholding: <ul style="list-style-type: none"> • Name of the Company and the number of shares held • Market Value of these Shares as at 31 March 2022 • Details and documentation of all sales & purchases • Details of share reinvestments Do you have any interest in a foreign company, unit trust, life insurance policy, pension fund or super scheme? If yes, please provide details	Yes	No																
7)	Rental Income (including Air B & B) Did you receive any rental income? (IF YES, COMPLETE SCHEDULE 1)	Yes	No																
8)	Income Protection Insurance Do you have Income Protection Insurance? If yes, please attach a copy of the invoice.	Yes	No																
9)	Kiwi Saver Do you belong to Kiwi Saver? If yes, Name of Provider _____ Please provide a copy of your end of year tax statement to check that the tax rate being applied is correct based on your income.	Yes	No																