

## Schedule 7 - Investor & Other Information

Entity Name: \_\_\_\_\_

1)	<p><b>Income</b> Did you receive any income from paid wages / superannuation? If yes, the IRD will send us your Summary of Earnings automatically.</p>	Yes	No																
2)	<p><b>Rebate Information</b> Please provide receipts for Donations made</p>	Yes	No																
3)	<p><b>Other Income</b> Did you receive any other income, for example from estates or trusts, annuity / pensions ? If yes, attach a copy of supporting documentation</p> <table border="1"> <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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_____	_____	\$ _____	\$ _____																
_____	_____	\$ _____	\$ _____																
_____	_____	\$ _____	\$ _____																
4)	<p><b>Portfolio Summary Reports</b> 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.</p>	Yes	No																
5)	<p><b>New Zealand - Interest / Dividends / Portfolio Investment Entities (PIE) Income</b> Did you receive any income from these sources? If yes, please provide advice notices</p>	Yes	No																
6)	<p><b>Overseas - Interest / Dividends / Other Income / Pensions / Superannuation</b> Did you receive any income from these sources? If yes, please provide income distribution details We also require the following information for each shareholding:</p> <ul style="list-style-type: none"> <li>Name of the Company and the number of shares held</li> <li>Market Value of these Shares as at 31 March 2024</li> <li>Details and documentation of all sales &amp; purchases</li> <li>Details of share reinvestments</li> </ul> <p>Do you have any interest in a foreign company, unit trust, life insurance policy, pension fund or super scheme? If yes, please provide details</p>	Yes	No																
7)	<p><b>Rental Income (including Air B &amp; B)</b> Did you receive any rental income? (IF YES, COMPLETE SCHEDULE 1)</p>	Yes	No																
8)	<p><b>Income Protection Insurance</b> Do you have Income Protection Insurance? If yes, please attach a copy of the invoice.</p>	Yes	No																
9)	<p><b>Kiwi Saver</b> Do you belong to Kiwi Saver? If yes, Name of Provider _____</p> <p>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.</p>	Yes	No																