

# Self-employment Summary



Please complete this form and provide the required records for each tax year you have received income from self-employment or as directed by your case manager.

## Your Details

First Name(s)	<input type="text"/>															
Last Name	<input type="text"/>															
WooHoo ID or IRD Number	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Date of Birth	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Email Address	<input type="text"/>															
Mobile	<input type="text"/>															
Address	<input type="text"/>															
Suburb	<input type="text"/>							Town/City	<input type="text"/>							
Postcode	<input type="text"/>															

## Tax Return Details

Tax Year ending 31 March	<input type="text"/>	Have you previously filed a tax return?	<input type="radio"/> Yes	<input type="radio"/> No
Are you GST Registered?	<input type="radio"/> Yes	<input type="radio"/> No	If applicable, who filed your previous tax return(s)?	<input type="text"/>

## Business Details

Occupation Description	<input type="text"/>										
Self-employment Start Date	<input type="text"/>	Self-employment End Date	<input type="text"/>								
Total Income from Self-employment	<input type="text"/>	Approx. Average Hours Worked Per Week	<input type="text"/>								

Please select **one** of the following options that best describes your business structure:

- I am a sole trader/independent contractor
- I am in a business partnership
- I am a shareholder employee of a company

## Expenses

You can claim business expenses that directly relate to earning your self-employment income and offset them against your income. Please list your applicable expenses below and provide copies of statements or receipts of the payments.

Advertising	\$ <input type="text"/>	Mobile Phone & Data	\$ <input type="text"/>
Accounting & Tax Preparation	\$ <input type="text"/>	Other Expenses	\$ <input type="text"/>
Bank Fees	\$ <input type="text"/>	Premiums & Levies	\$ <input type="text"/>
Distinctive Work Clothing	\$ <input type="text"/>	Repairs & Maintenance	\$ <input type="text"/>
Entertainment	\$ <input type="text"/>	Software	\$ <input type="text"/>
Fuel	\$ <input type="text"/>	Stationery & Office Supplies	\$ <input type="text"/>
General Expenses	\$ <input type="text"/>	Subscriptions	\$ <input type="text"/>
Insurance	\$ <input type="text"/>	Technology (under \$500)	\$ <input type="text"/>
Interest Paid on Loans	\$ <input type="text"/>	Tools & Equipment	\$ <input type="text"/>
Legal Fees	\$ <input type="text"/>	Training & Development	\$ <input type="text"/>

## Fixed Assets

Please list all assets for your self-employment that were purchased (if over \$500) or sold during the tax year.

Asset	Purchase Date	Sale Date	Amount
<input type="text"/>	DD / MM / YYYY	DD / MM / YYYY	\$ <input type="text"/>
<input type="text"/>	DD / MM / YYYY	DD / MM / YYYY	\$ <input type="text"/>
<input type="text"/>	DD / MM / YYYY	DD / MM / YYYY	\$ <input type="text"/>
<input type="text"/>	DD / MM / YYYY	DD / MM / YYYY	\$ <input type="text"/>
<input type="text"/>	DD / MM / YYYY	DD / MM / YYYY	\$ <input type="text"/>

## Vehicle Details & Mileage

If you use a vehicle for business purposes, you may be eligible to claim relevant expenses and deductions that directly relate to earning your business income and offset them against your income.

Plate Number	<input type="text"/>	Vehicle Year	<input type="text"/>
Vehicle Make	<input type="text"/>	Vehicle Model	<input type="text"/>
Purchase Date	<input type="text" value="DD / MM / YYYY"/>	Is this vehicle also used for private purposes?	<input type="radio"/> Yes <input type="radio"/> No
Purchase Price	<input type="text" value="\$"/>	Is this vehicle usually parked in a garage when not in use?	<input type="radio"/> Yes <input type="radio"/> No

Please provide a copy of your Sale & Purchase Agreement

There are **two** methods to calculate claims for vehicle running costs: Actual business distance as recorded daily in a logbook OR business use percentage as calculated after keeping a logbook for 90 consecutive days. Please complete **one** of the following.

### Actual Business Distance Method:

Total Distance for Year	<input type="text"/>	km
Business Distance for Year	<input type="text"/>	km

Please provide a copy of your logbook

### Business Use Percentage Method:

Total Distance for Year	<input type="text"/>	km
Business Use Percentage	<input type="text"/>	%

Please provide a copy of your logbook

## Home Office Details

If you use part of your home for your business you may be able to claim a percentage of running costs as a business-related expense. Please list your applicable home office expenses below and provide copies of statements or receipts of the payments.

Electricity & Gas	<input type="text" value="\$"/>	Rates	<input type="text" value="\$"/>
Home & Contents Insurance	<input type="text" value="\$"/>	Rent (if applicable)	<input type="text" value="\$"/>
Interest Paid on Mortgage	<input type="text" value="\$"/>	Repairs & Maintenance	<input type="text" value="\$"/>
Internet	<input type="text" value="\$"/>	Water Rates	<input type="text" value="\$"/>
Total Area of Home	<input type="text"/>		m <sup>2</sup>
Area of Home Office	<input type="text"/>	Avg. Time Spent Working from Home Office (per week)	<input type="text"/>
Area of Garage (if applicable)	<input type="text"/>		hours
		No. Vehicles Usually Parked in Garage (if applicable)	<input type="text"/>

## Additional Information or Comments

If you have any comments or additional information, including expenses, that you think may be relevant to your tax return or account, please tell us about them here.

## Other Required Information

Please provide the following information in relation to your self-employment or as directed by your case manager.

- Copies of payment statements, invoices, or remittances that clearly detail all self-employment income
- Copies of business account bank statements clearly showing self-employment income
- Copies of receipts and/or statements for all expenses and fixed assets indicated on this form
- Copies of invoices or other details for all repairs or maintenance expenses indicated on this form
- Copies of all business-related loan or hire purchase agreements
- Copies of all business-related loan or hire purchase statements showing interest paid and closing balances
- Copy of Rates Demand (if applicable)

## Acknowledgement and Agreement

- I authorise WooHoo NZ Tax Refunds to complete and filing any necessary income tax returns on my behalf. I confirm that the information included in this form, and provided as requested, is complete, true and correct.

I also authorise WooHoo NZ Tax Refunds to seek any additional information they may require for the purpose of preparing and completing my financial statements, annual accounts and income tax returns. This includes information from the Companies Office, Solicitors, Employees, Banks or other financial institutions, Property Managers, and other Advisors, and I hereby authorise my Solicitors, Employees, Banks or other financial institutions, Property Managers, and Advisors to supply such information.

Your Signature

Date

DD / MM / YYYY

## *We're Here to Help*

If you have any questions or need a hand, just get in touch! Send us an email to [taxteam@woohoo.co.nz](mailto:taxteam@woohoo.co.nz) or you can chat directly with our support team at [www.woohoo.co.nz](http://www.woohoo.co.nz)

## *Contact Information*

### **Postal Address**

WooHoo NZ Tax Refunds Ltd  
PO Box 28125  
Christchurch 8242

### **Email**

[taxteam@woohoo.co.nz](mailto:taxteam@woohoo.co.nz)