

Individual Questionnaire – 2011

Ensure this questionnaire is completed and included with your records

Name		Balance Date	
Email Home:		Phone Home:	
Email Work:		Phone Work:	
Fax:		Mobile:	

Terms of Engagement

I/We hereby instruct you to prepare my/our Financial Statements and Taxation Returns for this year from the information and records I/We have supplied to you. I/We accept responsibility for the accuracy and completeness of all records and information supplied to you.

You are hereby authorised to communicate with my/our bankers, solicitors, finance companies, and any other business that I/We deal with to obtain such information as you require in order to complete the above duties.

Signature _____ Date _____

Records Required	<input checked="" type="checkbox"/>	Comments
Wages/National Superannuation/Benefits		
Please provide us with the names of any organisations you have received the following from: <ul style="list-style-type: none"> ▪ Wages ▪ ACC Payments ▪ National Superannuation ▪ Any other benefits In most cases IRD will have sent us these details direct, however we do need to check all details have been included.	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	
Interest and Dividends		
Please supply the advice slips. <ul style="list-style-type: none"> ▪ For interest received, you should have an annual advice notice showing the withholding tax deducted. This may be on the bottom of your Bank Statement dated 31 March. ▪ If any dividends are taken as bonus shares, also include these advice slips. ▪ Portfolio Investment Entity (PIE) income 	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	
Rental and Leased Property		
Please complete attached rental questionnaire		
Partnerships, Trusts, Estates and Companies		
Please supply details of income received.	<input type="checkbox"/>	
Overseas		
<ul style="list-style-type: none"> ▪ Include overseas interest, dividends, wages received and taxation paid. ▪ Foreign Investment Fund income Note: New Zealand residents are liable for tax on all world-wide income.	<input type="checkbox"/> <input type="checkbox"/>	

Any Other Income			
Attach details <ul style="list-style-type: none"> Income Replacement Insurance Policy – provide details of premiums and claims. Loss Attributing Qualifying Company – if you have been allocated a share of a loss other than from a company that we are aware of, please provide details 	<input type="checkbox"/>		
Hours per week			
If you think that your income may be less than \$9,880 then please advise how many weeks during the year did you work more than 20 hours each week. (Count holidays as non working weeks).	<input type="checkbox"/>	Number of weeks	_____
Donations, Housekeeping and Childcare Tax Rebates			
Have you any rebates to claim? Yes <input type="checkbox"/> No <input type="checkbox"/> If Yes, have you sent your rebate claim form to Inland Revenue? Yes <input type="checkbox"/> No <input type="checkbox"/> Do you want us to complete your rebate claim form? Yes <input type="checkbox"/> No <input type="checkbox"/>			
Child Rebate			
If you have school children who have received wages they are eligible for the child rebate. Please attach their interest and dividend certificates for completion of their tax returns. NOTE: They are likely to get a refund if they earned under \$2,340	<input type="checkbox"/>		
Working for Families Tax Credits and Parental Tax Credit			
Please supply full names and birth dates of all children. Please note the following: <ul style="list-style-type: none"> If you had a child born within the current financial year you may be eligible for the Parental Tax Credit. Please include their IRD Number below. If you do not have this you will need to obtain one for them in order to claim any entitlement for them. Where a child has become financially independent during the current financial year, please advise the date they left school or home. If you have received Working for Families Tax Credits during the year, please supply the certificate issued to you by IRD, detailing the amounts. Also provide details of any child support or maintenance payments made or received.	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>		
<u>Child's Name</u>	<u>IRD No.</u>	<u>Date of Birth</u>	<u>Date left School</u>
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Thank you for completing this questionnaire. Don't forget to sign it