

# Individual Questionnaire

Ensure this questionnaire is completed and included with your records

Client Name		Phone:	
Balance Date	31 March 2019	Email:	

To:

## Terms of Engagement

I hereby instruct you to prepare our Taxation Returns for the 2019 year. I undertake to supply all information necessary to carry out such services, and will be responsible for the accuracy and completeness of such information. You are hereby authorised to communicate with my bankers, solicitors, finance companies and all government agencies to obtain such information as you require in order to complete the above assignments. I authorise you to obtain information from Inland Revenue about all tax types except child support (NCP or CPR) in order to complete the above assignments. This includes obtaining information through all Inland Revenue media and communication channels.

You are to represent me/us as my/our tax agent. All income tax returns will be signed by me/us however you are authorised to sign any other taxation return on behalf of myself/ourselves or any of my/our associated entities.

I/We also accept that you have the right to charge interest on overdue accounts at the rate of 1.5% per month, and that all accounts are due for payment by the 20<sup>th</sup> of the month following invoice date. The charging of such interest will be at your discretion. I/We accept that any collection costs you incur will be fully recoverable from me/us.

Please provide us with the bank account number you wish any refunds to be paid to

<i>Bank</i>	<i>Branch</i>	<i>Account Number</i>
<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"/> <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"/>
<i>Suffix</i>		

Signature \_\_\_\_\_ Date \_\_\_\_\_

I would like to receive my Tax return  By email  Hard copy in post

Records Required	✓	Comments
<b>Wages/National Superannuation/Benefits</b>		
Please provide us with the names of any organisations you have received the following from: <ul style="list-style-type: none"> <li>▪ Wages</li> <li>▪ ACC payments</li> <li>▪ National Superannuation</li> <li>▪ Any other benefits</li> </ul> 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"/>	
<b>Student Loan</b>		
Do you have a student loan? If so, please provide your latest statement from IRD	<input type="checkbox"/> <input type="checkbox"/>	
<b>Interest and Dividends</b>		
Please supply the advice slips. <ul style="list-style-type: none"> <li>▪ 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</li> <li>▪ If any dividends are taken as bonus shares, also include these advice slips</li> <li>▪ Please advise what rate has been applied to any Kiwisaver or other PIE investment</li> </ul>	<input type="checkbox"/> <input type="checkbox"/>	

<b>Rental and Leased Property</b>		
Please complete attached rental questionnaire	<input type="checkbox"/>	
<b>Partnerships, Trusts, Estates and Companies</b>		
Please supply details of income earned from any entity for which we do not prepare the accounts and tax returns.	<input type="checkbox"/>	
<b>Records Required</b>	✓	<b>Comments</b>
<b>Overseas</b>		
<ul style="list-style-type: none"> <li>▪ Supply details of overseas interest, dividends, wages received and taxation paid <input type="checkbox"/></li> <li>▪ Provide details of any overseas investments held at any time during the financial year <input type="checkbox"/></li> <li>▪ Attach all of your investments advisor's reports <input type="checkbox"/></li> <li>▪ Have you at any point in your lifetime, ever contributed to a foreign superannuation scheme, even if you cannot receive the benefits until you retire? <input type="checkbox"/></li> </ul>		
<b>Any Other Income</b>		
Attach details: <ul style="list-style-type: none"> <li>▪ Income Replacement Insurance Policy – provide details of premiums and claims <input type="checkbox"/></li> <li>▪ Look Through Company – if you have been allocated a share of a loss other than from a company that we are aware of, please provide details</li> </ul>		
<b>Donations</b>		
Do you want us to complete your rebate claim form? Yes <input type="checkbox"/> No <input type="checkbox"/> If so, please attach receipts.	<input type="checkbox"/>	
<b>Mixed Use Asset</b>		
Do you have an asset (such as a holiday home, bach, plane or boat) that is used privately and also to derive income? <div style="text-align: right;">Yes <input type="checkbox"/> No <input type="checkbox"/></div> If yes, please see our mixed use asset questionnaire on our website <a href="http://www.hargreaves.co.nz">www.hargreaves.co.nz</a> .		

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