

Individual Questionnaire – 31 March 2009

Ensure this questionnaire is completed and included with your records

Client Name		Phone:	
Balance Date	31 March 2009	Fax:	
		Email:	

To: Accountants First

Signature _____ Date _____

Records Required	Ü	Comments
Wages/National Superannuation/Benefits		
Please provide us with the names of any organisations you have received the following from: § 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.	C C C C	
Student Loan		
Do you have a Student Loan? If so, please provide your latest statement from IRD	C	
Interest and Dividends		
Please supply the advice slips. § 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.	C C	
Rental and Leased Property		
Please complete attached rental questionnaire		
Home Office Expenses		
If part of your home is set aside principally for use as an office/workshop/storage area, please provide the following details:		
Power \$ _____ Insurance (Building & Contents) \$ _____ Interest (House Mortgage) \$ _____ Rates \$ _____ Repairs & Maintenance \$ _____ Other \$ _____ Total \$ _____	Cost of House and Section \$ _____ Cost of Section \$ _____ Construction materials: (timber, brick, etc): _____ Business Area _____ M2 Total Area _____ M2	



Records Required	Ü	Comments	
Partnerships, Trusts, Estates and Companies			
Please supply details of income received.	C		
Overseas			
Include overseas interest, dividends, wages received and taxation paid. Note: New Zealand residents are liable for tax on all world-wide income.	C		
Any Other Income			
Attach details § 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	C		
Donations, Housekeeping and Childcare Tax Rebates			
Have you any rebates to claim? Yes C No C If Yes, have you sent your rebate claim form to Inland Revenue? Yes C No C Do you want us to complete your rebate claim form? Yes C No C			
Working for Families Tax Credits and Parental Tax Credit			
Please supply full names and birth dates of all children. Please note the following: § 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.	C C C C		
<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**

