

Individual Questionnaire – 31 March 2011

Ensure this questionnaire is completed and included with your records

Client Name		Phone:	
Balance Date	31 March 2011	Fax:	
		Email:	

To: Accountants First Ltd

Signature _____ Date _____

Convenient time to call you is:	
Alternative phone numbers are:	
When do you want your accounts completed by?	
Would you like us to supply a copy to your bank?	Yes <input type="checkbox"/> No <input type="checkbox"/> (Tick One)

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.	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	
Student Loan		
Do you have a student loan? If so, please provide your latest statement from IRD	<input type="checkbox"/>	
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	<input type="checkbox"/> <input type="checkbox"/>	
Rental and Leased Property		
Please complete attached rental questionnaire		

Home Office Expenses		Ü	Comments
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)	\$ _____		Cost of House and Section \$ _____
Interest (House Mortgage)	\$ _____		Cost of Section \$ _____
Rates	\$ _____		Construction materials: (timber, brick, etc): _____
Repairs & Maintenance	\$ _____		
Other	\$ _____		Area used for Business: _____ m ²
Total	\$ _____		Total Area of House & Workshop: _____ m ²
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 tax residents are liable for tax on all world-wide income. If Yes, please provide details of the value and quantity of the investments held at any time during the financial year. Please provide the date, value and details of any purchases, sales and income (dividends). Please attach all of your investments advisor's reports. This information is required so we can calculate if any income needs to be declared under the FIF (Foreign Investment Fund) rules.		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 Credits			
Do you want us to complete your rebate claim form? Yes C No C If so, please attached receipts.			

Working for Families Tax Credits and Parental Tax Credit																																							
<p>Please supply full names and birth dates of all children. Please note the following:</p> <p>§ 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</p> <p>§ Where a child has become financially independent during the current financial year, please advise the date they left school or home</p> <p>If you have received Working for Families Tax Credits during the year, please supply the certificate issued to you by IRD, detailing the amounts.</p> <p>Also provide details of any child support or maintenance payments made or received.</p>	C																																						
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<table style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left; border-bottom: 1px solid black; padding: 5px;"><u>Child's Name</u></th> <th style="text-align: left; border-bottom: 1px solid black; padding: 5px;"><u>IRD No.</u></th> <th style="text-align: left; border-bottom: 1px solid black; padding: 5px;"><u>Date of Birth</u></th> <th style="text-align: left; border-bottom: 1px solid black; padding: 5px;"><u>Date left School</u></th> </tr> </thead> <tbody> <tr><td style="border-bottom: 1px solid black; height: 20px;"></td><td style="border-bottom: 1px solid black; height: 20px;"></td><td style="border-bottom: 1px solid black; height: 20px;"></td><td style="border-bottom: 1px solid black; height: 20px;"></td></tr> <tr><td style="border-bottom: 1px solid black; height: 20px;"></td><td style="border-bottom: 1px solid black; height: 20px;"></td><td style="border-bottom: 1px solid black; height: 20px;"></td><td style="border-bottom: 1px solid black; height: 20px;"></td></tr> <tr><td style="border-bottom: 1px solid black; height: 20px;"></td><td style="border-bottom: 1px solid black; height: 20px;"></td><td style="border-bottom: 1px solid black; height: 20px;"></td><td style="border-bottom: 1px solid black; height: 20px;"></td></tr> <tr><td style="border-bottom: 1px solid black; height: 20px;"></td><td style="border-bottom: 1px solid black; height: 20px;"></td><td style="border-bottom: 1px solid black; height: 20px;"></td><td style="border-bottom: 1px solid black; height: 20px;"></td></tr> <tr><td style="border-bottom: 1px solid black; height: 20px;"></td><td style="border-bottom: 1px solid black; height: 20px;"></td><td style="border-bottom: 1px solid black; height: 20px;"></td><td style="border-bottom: 1px solid black; height: 20px;"></td></tr> <tr><td style="border-bottom: 1px solid black; height: 20px;"></td><td style="border-bottom: 1px solid black; height: 20px;"></td><td style="border-bottom: 1px solid black; height: 20px;"></td><td style="border-bottom: 1px solid black; height: 20px;"></td></tr> <tr><td style="border-bottom: 1px solid black; height: 20px;"></td><td style="border-bottom: 1px solid black; height: 20px;"></td><td style="border-bottom: 1px solid black; height: 20px;"></td><td style="border-bottom: 1px solid black; height: 20px;"></td></tr> <tr><td style="border-bottom: 1px solid black; height: 20px;"></td><td style="border-bottom: 1px solid black; height: 20px;"></td><td style="border-bottom: 1px solid black; height: 20px;"></td><td style="border-bottom: 1px solid black; height: 20px;"></td></tr> </tbody> </table>	<u>Child's Name</u>	<u>IRD No.</u>	<u>Date of Birth</u>	<u>Date left School</u>																																			
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Thank you for completing this questionnaire

Don't forget to sign it

