

Individual Questionnaire

Ensure this questionnaire is completed and included with your records

Client Name	
Balance Date	

Records Required	✓	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"/>	
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. <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 	<input type="checkbox"/> <input type="checkbox"/>	
Partnerships, Trusts, Estates, Companies and Rental or Leased Property		
Please supply details of income earned from any entity for which we do not prepare the accounts and tax returns.	<input type="checkbox"/>	
Overseas		
<ul style="list-style-type: none"> ▪ Supply details of overseas interest, dividends, wages received and taxation paid. ▪ Provide details of any overseas investments held at any time during the financial year. ▪ Attach all of your investments advisor's reports. ▪ 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"/> <input type="checkbox"/> <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. ▪ 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 	<input type="checkbox"/> <input type="checkbox"/>	
Donations & Tax Refunds		
Do you want us to complete your rebate claim form? Yes <input type="checkbox"/> No <input type="checkbox"/> If so, please attach receipts. Please also provide bank account details for any tax refunds you may receive.	<input type="checkbox"/>	
Working for Families Tax Credits and Parental Tax Credit		
Please indicate if you have had any children in your care during the year.	<input type="checkbox"/>	

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