

Individual Questionnaire – 2018

Ensure this questionnaire is completed and included with your records

Client Name		Phone:	Business : Cellular:
Balance Date		Fax:	
		Email:	

Terms of Engagement

I hereby instruct Lawson Avery Ltd to prepare our Taxation Returns for the 2018 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 carry out the above assignments.

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 20th 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.

You are authorised to sign any other taxation return on behalf of myself/ourselves or any of my/our associated entities.

Signature _____ Date _____

IRD requires that a bank account be provided for any refunds as they will be no longer issuing cheques, Please advise account details below.

Account Name : _____

Account Number: _____ - _____ - _____

Records Required	✓	Comments
<p>Wages/National Superannuation/Benefits Please provide us with the names of any organisations you have received the following from:</p> <ul style="list-style-type: none"> ▪ Wages ▪ ACC payments ▪ National Superannuation ▪ Any other benefits <p>In most cases IRD will have sent us these details direct, however we do need to check all details have been included.</p>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	
<p>Student Loan Do you have a student loan?</p>	<input type="checkbox"/>	
Investments		
<p>Overseas Shares/Investment Trusts Please provide;</p> <ul style="list-style-type: none"> ▪ A list of all overseas shares owned at 31 March 2017 (i.e. the start of the tax year). ▪ A list of all overseas shares purchased and sold during the year. 	<input type="checkbox"/> <input type="checkbox"/>	

Portfolio Investment Entity (PIE) Distributions

Please provide;

- PIE distribution statements
- Kiwisaver annual tax statements

Interest

Please provide;

- Withholding Tax Deduction Certificates
- List below, details of any interest received for the year ended 31 March 2018, including all bank account interest no matter how small the amount, that you have not provided a certificate or statement for.

<u>Payer</u>	<u>RWT</u>	<u>GROSS</u>
_____	_____	_____
_____	_____	_____
_____	_____	_____

Dividends

Please provide;

- Dividend statements for all dividends (NZ and overseas) received for year ended 31 March 2018
- Details of bonus shares issued in lieu of dividends
- The amount of NZ currency for overseas dividends received
- Contract Settlement statements if you have bought or sold any shares during the year ended 31 March 2018
- List below, details of any dividends received that you have not provided a statement

<u>Payer</u>	<u>IMP. CR</u>	<u>W/HOLD TAX</u>	<u>GROSS</u>	<u>NZ CURRENCY</u>
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

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	\$ _____	Cost of House and Section \$ _____ Cost of Section \$ _____ Construction materials: (timber, brick, etc): _____ Area used for Business: _____ m ² Total Area of House & Workshop: _____ m ²
Insurance (Building & Contents)	\$ _____	
Interest (House Mortgage)	\$ _____	
Rates	\$ _____	
Repairs & Maintenance	\$ _____	
Other	\$ _____	
Total	\$ _____	

Partnerships, Trusts, Estates and Companies

Please supply details of income received.

<p>Any Other Income Attach details</p> <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 income or loss other than from a company that we are aware of, please provide details 	<input type="checkbox"/>																													
<p>Mixed Use Holiday Home Do you have a property (such as a holiday home or a bach) that is used privately and also to derive income? Yes <input type="checkbox"/> No <input type="checkbox"/></p> <p>NB: If yes we will contact you for additional; information we will require</p>																														
<p>Rental and Leased Property Please complete attached rental questionnaire</p>	<input type="checkbox"/>																													
<p>Donations, Housekeeping and Childcare Tax Credits Do you want us to complete your rebate claim form? Yes <input type="checkbox"/> No <input type="checkbox"/> If so, please attached receipts.</p>																														
<p>Working for Families Tax Credits and Parental Tax Credit Please supply full names and birth dates of all children. Please note the following:</p> <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 <input type="checkbox"/> ▪ Where a child has become financially independent during the current financial year, please advise the date they left school or home <input type="checkbox"/> <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. <input type="checkbox"/></p> <p>Also provide details of any child support or maintenance payments made or received. <input type="checkbox"/></p>																														
<table style="width:100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left; border-bottom: 1px solid black;"><u>Child's Name</u></th> <th style="text-align: left; border-bottom: 1px solid black;"><u>IRD No.</u></th> <th style="text-align: left; border-bottom: 1px solid black;"><u>Date of Birth</u></th> <th style="text-align: left; border-bottom: 1px solid black;"><u>Date left School</u></th> </tr> </thead> <tbody> <tr><td>_____</td><td>_____</td><td>_____</td><td>_____</td></tr> <tr><td>_____</td><td>_____</td><td>_____</td><td>_____</td></tr> <tr><td>_____</td><td>_____</td><td>_____</td><td>_____</td></tr> <tr><td>_____</td><td>_____</td><td>_____</td><td>_____</td></tr> <tr><td>_____</td><td>_____</td><td>_____</td><td>_____</td></tr> <tr><td>_____</td><td>_____</td><td>_____</td><td>_____</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**