

Individual Questionnaire – 2017

Ensure this questionnaire is completed and included with your records

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

Terms of Engagement

I hereby instruct Lawson Avery Ltd to prepare our Taxation Returns for the 2017 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 _____

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?	<input type="checkbox"/>	
Investments		
Overseas Shares/Investment Trusts Please provide; <ul style="list-style-type: none">▪ A list of all overseas shares owned at 31 March 2015 (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; <ul style="list-style-type: none">▪ PIE distribution statements▪ Kiwisaver annual tax statements	<input type="checkbox"/> <input type="checkbox"/>	

Interest Please provide; <ul style="list-style-type: none"> ▪ Withholding Tax Deduction Certificates ▪ List below, details of any interest received for the year ended 31 March 2017, including all bank account interest no matter how small the amount, that you have <u>not</u> provided a certificate or statement for. 	<input type="checkbox"/>													
<table style="width: 100%; border-collapse: collapse;"> <tr> <th style="text-align: left; border-bottom: 1px solid black; width: 50%;"><u>Payer</u></th> <th style="text-align: left; border-bottom: 1px solid black; width: 20%;"><u>RWT</u></th> <th style="text-align: left; border-bottom: 1px solid black; width: 30%;"><u>GROSS</u></th> </tr> <tr><td style="border-bottom: 1px solid black;"></td><td style="border-bottom: 1px solid black;"></td><td style="border-bottom: 1px solid black;"></td></tr> <tr><td style="border-bottom: 1px solid black;"></td><td style="border-bottom: 1px solid black;"></td><td style="border-bottom: 1px solid black;"></td></tr> <tr><td style="border-bottom: 1px solid black;"></td><td style="border-bottom: 1px solid black;"></td><td style="border-bottom: 1px solid black;"></td></tr> </table>	<u>Payer</u>	<u>RWT</u>	<u>GROSS</u>											
<u>Payer</u>	<u>RWT</u>	<u>GROSS</u>												

Dividends Please provide; <ul style="list-style-type: none"> ▪ Dividend statements for all dividends (NZ and overseas) received for year ended 31 March 2017 ▪ 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 2017 ▪ List below, details of any dividends received that you have <u>not</u> provided a statement 	<input type="checkbox"/> <input type="checkbox"/>																					
<table style="width: 100%; border-collapse: collapse;"> <tr> <th style="text-align: left; border-bottom: 1px solid black; width: 35%;"><u>Payer</u></th> <th style="text-align: left; border-bottom: 1px solid black; width: 10%;"><u>IMP. CR</u></th> <th style="text-align: left; border-bottom: 1px solid black; width: 10%;"><u>W/HOLD TAX</u></th> <th style="text-align: left; border-bottom: 1px solid black; width: 10%;"><u>GROSS</u></th> <th style="text-align: left; border-bottom: 1px solid black; width: 25%;"><u>NZ CURRENCY</u></th> </tr> <tr><td style="border-bottom: 1px solid black;"></td><td style="border-bottom: 1px solid black;"></td><td style="border-bottom: 1px solid black;"></td><td style="border-bottom: 1px solid black;"></td><td style="border-bottom: 1px solid black;"></td></tr> <tr><td style="border-bottom: 1px solid black;"></td><td style="border-bottom: 1px solid black;"></td><td style="border-bottom: 1px solid black;"></td><td style="border-bottom: 1px solid black;"></td><td style="border-bottom: 1px solid black;"></td></tr> <tr><td style="border-bottom: 1px solid black;"></td><td style="border-bottom: 1px solid black;"></td><td style="border-bottom: 1px solid black;"></td><td style="border-bottom: 1px solid black;"></td><td style="border-bottom: 1px solid black;"></td></tr> </table>	<u>Payer</u>	<u>IMP. CR</u>	<u>W/HOLD TAX</u>	<u>GROSS</u>	<u>NZ CURRENCY</u>																	
<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:

<table style="width: 100%; border-collapse: collapse;"> <tr><td style="width: 30%;">Power</td><td style="width: 20%;">\$</td><td style="width: 50%;"><input style="width: 90%;" type="text"/></td></tr> <tr><td>Insurance (Building & Contents)</td><td>\$</td><td><input style="width: 90%;" type="text"/></td></tr> <tr><td>Interest (House Mortgage)</td><td>\$</td><td><input style="width: 90%;" type="text"/></td></tr> <tr><td>Rates</td><td>\$</td><td><input style="width: 90%;" type="text"/></td></tr> <tr><td>Repairs & Maintenance</td><td>\$</td><td><input style="width: 90%;" type="text"/></td></tr> <tr><td>Other</td><td>\$</td><td><input style="width: 90%;" type="text"/></td></tr> <tr><td>Total</td><td>\$</td><td><input style="width: 90%;" type="text"/></td></tr> </table>	Power	\$	<input style="width: 90%;" type="text"/>	Insurance (Building & Contents)	\$	<input style="width: 90%;" type="text"/>	Interest (House Mortgage)	\$	<input style="width: 90%;" type="text"/>	Rates	\$	<input style="width: 90%;" type="text"/>	Repairs & Maintenance	\$	<input style="width: 90%;" type="text"/>	Other	\$	<input style="width: 90%;" type="text"/>	Total	\$	<input style="width: 90%;" type="text"/>	<table style="width: 100%; border-collapse: collapse;"> <tr><td style="width: 30%;">Cost of House and Section</td><td style="width: 20%;">\$</td><td style="width: 50%;"><input style="width: 90%;" type="text"/></td></tr> <tr><td>Cost of Section</td><td>\$</td><td><input style="width: 90%;" type="text"/></td></tr> <tr><td colspan="3">Construction materials: (timber, brick, etc):</td></tr> <tr><td colspan="3"><input style="width: 95%;" type="text"/></td></tr> <tr><td colspan="3">Area used for Business: <input style="width: 40%;" type="text"/> m²</td></tr> <tr><td colspan="3">Total Area of House & Workshop: <input style="width: 40%;" type="text"/> m²</td></tr> </table>	Cost of House and Section	\$	<input style="width: 90%;" type="text"/>	Cost of Section	\$	<input style="width: 90%;" type="text"/>	Construction materials: (timber, brick, etc):			<input style="width: 95%;" type="text"/>			Area used for Business: <input style="width: 40%;" type="text"/> m ²			Total Area of House & Workshop: <input style="width: 40%;" type="text"/> m ²		
Power	\$	<input style="width: 90%;" type="text"/>																																						
Insurance (Building & Contents)	\$	<input style="width: 90%;" type="text"/>																																						
Interest (House Mortgage)	\$	<input style="width: 90%;" type="text"/>																																						
Rates	\$	<input style="width: 90%;" type="text"/>																																						
Repairs & Maintenance	\$	<input style="width: 90%;" type="text"/>																																						
Other	\$	<input style="width: 90%;" type="text"/>																																						
Total	\$	<input style="width: 90%;" type="text"/>																																						
Cost of House and Section	\$	<input style="width: 90%;" type="text"/>																																						
Cost of Section	\$	<input style="width: 90%;" type="text"/>																																						
Construction materials: (timber, brick, etc):																																								
<input style="width: 95%;" type="text"/>																																								
Area used for Business: <input style="width: 40%;" type="text"/> m ²																																								
Total Area of House & Workshop: <input style="width: 40%;" type="text"/> m ²																																								

Partnerships, Trusts, Estates and Companies Please supply details of income received.	<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 income or loss other than from a company that we are aware of, please provide details 	<input type="checkbox"/>	

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 ☐ No ☐

NB: If yes we will contact you for additional; information we will require

Rental and Leased Property

Please complete attached rental questionnaire

☐
Donations, Housekeeping and Childcare Tax Credits

Do you want us to complete your rebate claim form? Yes ☐ No ☐

If so, please attached receipts.

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.

☐
☐
☐
☐

Child's Name

IRD No.

Date of Birth

Date left School

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