Individual Questionnaire – 2019

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 2019 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
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.	☐ ☐ ☐ ☐	
Student Loan Do you have a student loan?	☐	
Investments		
Overseas Shares/Investment Trusts Please provide; ▪ 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.	☐ ☐	

Portfolio Investment Entity (PIE) Distributions

Please provide;

- PIE distribution statements ☐
- Kiwisaver annual tax statements ☐

Interest

Please provide;

- Witholding Tax Deduction Certificates ☐
- List below, details of any interest received for the year ended 31 March 2019, including all bank account interest no matter how small the amount, that you have not provided a certificate or statement for.

Payer	**RWT**	**GROSS**
______________________	__________	__________
______________________	__________	__________
______________________	__________	__________

Dividends

Please provide;

- Dividend statements for all dividends (NZ and overseas) received for year ended 31 March 2019 ☐
- 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 2019 ☐
- List below, details of any dividends received that you have **not** provided a statement ☐

Payer	**IMP. CR**	**W/HOLD TAX**	**GROSS**	**NZ CURRENCY**
______________	________	________	________	________
______________	________	________	________	________
______________	________	________	________	________

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)	$__________	Cost of House and Section	$__________
Interest (House Mortgage)	$__________	Cost of Section	$__________
Rates	$__________	Construction materials: (timber, brick, etc):	
Repairs & Maintenance	$__________	______________________________	
Other	$__________	Area used for Business:	________ m²
Total	**$**__________	Total Area of House & Workshop:	________ m²

Partnerships, Trusts, Estates and Companies

Please supply details of income received. ☐

Any Other Income

Attach details

- 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

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