



Ensure this questionnaire is completed and included with your records

Balance Date ____ / ____ /2011

Records Required	✓	Comments	
<p>➤ Please provide us with the names of any organisations you have received the following from:</p> <p>▪ Wages ▪ ACC Payments ▪ National Superannuation ▪ Any other benefits</p> <p>In most cases IRD will have sent us these details direct, however we do need to check all details have been included.</p>			
➤ Do you have a Student Loan?	<input type="checkbox"/>		
<p>➤ Please supply advice slips for all interest and dividends received.</p> <p>For interest received, you should have an annual advice notice showing the withholding tax deducted.</p>	<input type="checkbox"/>		
➤ Please forward details of income and expenses for any rental properties			
<p>➤ Please supply details of any share of income from a partnership, trust, estate, company (where accounts not prepared by us).</p> <p>➤ Are you a trustee of a foreign trust? Please supply details of any gifting during the year.</p>	<input type="checkbox"/> <input type="checkbox"/>		
<p>➤ Please supply details of all overseas income including, overseas interest, dividends, wages received and taxation paid.</p> <p>Note: New Zealand residents are liable for tax on all world-wide income.</p> <p>➤ Do you hold any overseas life policies/superannuation?</p>	<input type="checkbox"/>		
<p>➤ Do you have more than \$50,000 (cost price) invested in shares in companies, other than those listed on the NZ and Australian stock exchanges.</p> <p>If YES, we require cost of the investment and market value at start of year. NB if the shares are held by a trust there is no \$50,000 exemption. We require details of all shares owned by Trusts.</p>	<input type="checkbox"/>		
➤ Income Replacement Insurance Policy – provide details of premiums paid.	<input type="checkbox"/>		
Donations, Housekeeping and Childcare Tax Rebates			
➤ Do you pay any donations, housekeeping or child care payments	Yes <input type="checkbox"/>	No <input type="checkbox"/>	
➤ If YES, have you sent your rebate claim form to Inland Revenue?	Yes <input type="checkbox"/>	No <input type="checkbox"/>	
➤ If NO, do you want us to complete your rebate claim form?	Yes <input type="checkbox"/>	No <input type="checkbox"/>	
Working for Families Tax Credits and Parental Tax Credit			
<p>➤ Please supply full names and birth dates of all children (see below).</p> <p>➤ If you had a child born within the current financial year you may be eligible for the Parental Tax Credit. Please include a copy of the child's birth certificate or their IRD No.</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>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>		
Child's Name	IRD No.	Date of Birth	Date left School
_____	_____	_____	_____
_____	_____	_____	_____
Signature _____		Date _____	