

Individual Questionnaire – 31st March 2010

Ensure this questionnaire is completed and included with your records

Client Name		Phone:	
Balance Date	31 st March 2010	Fax:	
		Email:	
Current Mailing Address			

To: Accountants on Victoria Limited

Terms of Engagement

I hereby instruct you to prepare our Taxation Returns for the 2010 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.

You are to represent me/us as my/our tax agent. All income tax returns will be signed by me/us however you are authorised to sign any other taxation return on behalf of myself/ourselves or any of my/our associated entities.

I also accept that Accountants on Victoria Limited has 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 within 14 days of invoice date. The charging of such interest will be at the discretion of Accountants on Victoria Limited. I/We accept that any collection costs incurred by Accountants on Victoria Limited will be fully recoverable from me/us.

Signature _____ Date _____

Records Required	Ü	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.	 C C C C	
Student Loan		
Do you have a Student Loan? If so, please provide your latest statement from IRD	 C	
Interest and Dividends		
Please supply the advice slips. § 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.	 C C	
Rental and Leased Property		
Please complete attached rental questionnaire		

Records Required	Ü	Comments	
Partnerships, Trusts, Estates and Companies			
Please supply details of income received.	C		
Overseas			
Include overseas interest, dividends, wages received and taxation paid. Note: New Zealand residents are liable for tax on all world-wide income. Include details of overseas shares and investments held as at 01 April 2009 and any sales and purchases to 31 March 2010. Note: <u>Tax rules</u> mean that New Zealand residents are liable for tax on changes in the value of overseas investments held.	C C		
Any Other Income			
Attach details § Income Replacement Insurance Policy – provide details of premiums and claims. § Loss Attributing Qualifying Company – if you have been allocated a share of a loss other than from a company that we are aware of, please provide details	C		
Donations, Housekeeping and Childcare Tax Rebates			
Have you any rebates to claim? Yes C No C If Yes, have you sent your rebate claim form to Inland Revenue? Yes C No C Do you want us to complete your rebate claim form? Yes C No C			
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.	C C C C		
<u>Child's Name</u>	<u>IRD No.</u>	<u>Date of Birth</u>	<u>Date left School</u>
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

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