

# Individual Questionnaire – 31 March 2008

Ensure this questionnaire is completed and included with your records

Client Name		Phone:	
Balance Date	31 March 2008	Fax:	
		Email:	

To: Jollands Callander

## Terms of Engagement

I hereby instruct you to prepare our Taxation Returns for the 2008 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 as my tax agent. You are therefore authorised to sign any taxation return on behalf of myself or any of my associated entities.

I also accept that Jollands Callander has the right to charge interest on overdue accounts at the rate of 2% per month, and that all accounts are due for payment within 7 days of the invoice date. The charging of such interest will be at the discretion of Jollands Callander. I/We accept that any collection costs incurred by Jollands Callander will be fully recoverable from me/us.

Signature \_\_\_\_\_ Date \_\_\_\_\_

Records Required	Ü	Comments
<b>Wages/National Superannuation/Benefits</b>		
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	
<b>Interest and Dividends</b>		
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	
<b>Rental and Leased Property</b>		
Please complete attached rental questionnaire		
<b>Home Office Expenses</b>		
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) \$ _____ Interest (House Mortgage) \$ _____ Rates \$ _____ Repairs & Maintenance \$ _____ Other \$ _____ <b>Total</b> \$ _____	Cost of House and Section \$ _____ Cost of Section \$ _____ Construction materials: (timber, brick, etc): _____ Business Area _____ M2 Total Area _____ M2	

Records Required	Ü	Comments																																
<b>Partnerships, Trusts, Estates and Companies</b>																																		
Please supply details of income received.	C																																	
<b>Overseas</b>																																		
Include overseas interest, dividends, wages received and taxation paid. <b>Note:</b> New Zealand residents are liable for tax on all world-wide income.	C																																	
<b>Any Other Income</b>																																		
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																																	
<b>Donations, Housekeeping and Childcare Tax Rebates</b>																																		
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																																		
<b>Working for Families Tax Credits and Parental Tax Credit</b>																																		
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																																	
<table border="0"> <thead> <tr> <th data-bbox="97 1518 268 1556"><u>Child's Name</u></th> <th data-bbox="783 1518 879 1556"><u>IRD No.</u></th> <th data-bbox="1070 1518 1225 1556"><u>Date of Birth</u></th> <th data-bbox="1262 1518 1453 1556"><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> <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**