

Annual Accounts Individual Questionnaire

Thank you for taking the time to complete this questionnaire. Please attempt to answer every question. The more information you can provide us, the more time we both will save.

If you are unsure if this questionnaire applies to you, or are having any trouble understanding the questions, please contact us on 03 379 8735.

**The completed questionnaire and any supporting information should be posted to:
Tax Link, PO Box 13-333, Christchurch 8141.**

01. Client Information

Full name	Financial year ended
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Please update your details below if there have been any changes:

Date of birth	IRD number
Phone	Email
Address	
Spouses name	Spouses IRD number
Spouses income	Spouses date of birth
Names of children & years of birth	

02. Income

Did you receive income from any of the sources listed below?

- | | | | | |
|--|--------------------------|-----|--------------------------|----|
| Salary or wages. | <input type="checkbox"/> | Yes | <input type="checkbox"/> | No |
| Unemployment or other income-tested benefits. | <input type="checkbox"/> | Yes | <input type="checkbox"/> | No |
| Family assistance payments from Work and Income. | <input type="checkbox"/> | Yes | <input type="checkbox"/> | No |
| ACC earnings. | <input type="checkbox"/> | Yes | <input type="checkbox"/> | No |
| Withholding payments. | <input type="checkbox"/> | Yes | <input type="checkbox"/> | No |
| NZ Super. | <input type="checkbox"/> | Yes | <input type="checkbox"/> | No |
| Other New Zealand pensions, annuities and superannuation. (If yes, please attach details.) | <input type="checkbox"/> | Yes | <input type="checkbox"/> | No |
| Interest. (If yes, please attach details including RWT form from payer showing interest PAYE paid to Inland Revenue.) | <input type="checkbox"/> | Yes | <input type="checkbox"/> | No |
| Dividends. (If yes, please attach dividend statements.) | <input type="checkbox"/> | Yes | <input type="checkbox"/> | No |
| An estate / trust / partnership business where we don't prepare accounts. (If yes, please attach details.) | <input type="checkbox"/> | Yes | <input type="checkbox"/> | No |
| Overseas earnings and investments / foreign rights disclosure. (If yes, please attach details of any overseas earnings and investments and taxation paid on these earnings.) | <input type="checkbox"/> | Yes | <input type="checkbox"/> | No |
| Shareholder—an employee salary or director fees from a company where we don't prepare the accounts. (If yes, please attach details.) | <input type="checkbox"/> | Yes | <input type="checkbox"/> | No |
| Non-cash benefits from a company in which you are a shareholder and on which FBT has not been paid. (If yes, please attach details.) | <input type="checkbox"/> | Yes | <input type="checkbox"/> | No |
| Rental income. (If yes, please complete section 08. Rental Income.) | <input type="checkbox"/> | Yes | <input type="checkbox"/> | No |
| Do you have a mixed use holiday home—a home rented and used privately. (If yes, please attach details of days used privately and days rented.) | <input type="checkbox"/> | Yes | <input type="checkbox"/> | No |
| Income from the sale of land / business. (If yes, please attach details.) | <input type="checkbox"/> | Yes | <input type="checkbox"/> | No |
| Income from the sale of shares or other property (not your residence). (If yes, please attach details.) | <input type="checkbox"/> | Yes | <input type="checkbox"/> | No |

02. Income (continued)

Income from the sale or redemption of securities. (If yes, please attach details.)

Yes

No

Income from government bonds. (If yes, please attach details of accrued interest on purchase of bond.)

Yes

No

Any other income e.g. royalties. (If yes, please attach details.)

Yes

No

03. Expenses

Did you have any expenses related to Schedular / Withholding Payments?

Yes

No

Did you pay any tax preparation fees?

Yes

No

Did you pay any income protection insurance?

Yes

No

Did you pay any commission on interest or dividend income?

Yes

No

Did you pay any investment advisor fees?

Yes

No

If yes to any of the above, please attach supporting documents.

04. Rebates

Did you make any voluntary payments on your student loan?

Yes

No

If yes, please attach supporting documents.

Do you have a Special Home / Farm / Fishing Vessel Ownership account?

Yes

No

If yes, please attach your "Increase in Savings Certificate" IR30 form your savings institutions.

Do you have any charitable donations to claim?

Yes

No

If yes, please attach donation receipts.

05. Working For Families

If you believe you are entitled to Working for Families Tax Credits (WFFTC), please download and complete the supplementary questionnaire from our website or contact us to request a copy.

06. Investments

During the year did you purchase and / or sell any real estate?

Yes

No

Did you purchase any shares?

Yes

No

Did you make any other investments?

Yes

No

If yes to any of the above, please attach supporting documents.

07. Other

Are you a shareholder in a look-through company for which we do not prepare accounts?

Yes

No

If no, go to section 08. If yes, please provide details below:

Company name	IRD number	Loss to be claimed
		\$
		\$
		\$

Has owners basis calculation been checked?

Yes

No

08. Tax

Are you registered for GST?

Yes

No

If yes, what dates were you registered for GST?

From	To
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If no, should you be registered for GST?

Yes

No

09. Rental Income

Did you receive any income from rent?

Yes

No

If no, go to section 10. If yes, please provide the information below:

Address of property	
Rent received	Number of months renting

Please list your expenses:

Advertising	Tip fees
Insurance	Mortgage interest
Rates	Postage and stationery
Repairs and maintenance	Agents collection fees
Car use for rent collection and maintenance	km/mile

If the property was purchased or sold during the year, please attach solicitors statements.

10. Bank Account Information

Please provide your bank account details so we can directly deposit any IRD refunds into your account:

Account name
Account number

11. Declaration

I confirm that I have examined all the matters mentioned, and I accept responsibility for the accuracy and completeness of the information supplied and the relevant details as requested. I hereby request Tax Link to compile my financial statements based on the information supplied and acknowledge that Tax Link is not to complete an audit to substantiate the accuracy of my information and therefore Tax Link will be unable to detect any error or fraud, nor to provide any assurance as to the accuracy of my financial statements to any person or any party for any reason. I agree that my financial statements are prepared as a service to me and agree to Tax Link attaching to these financial statements their standard accountant's statement of responsibilities.

Name of client _____

Signed _____

Date _____