

Individual Questionnaire – 2014

Ensure this questionnaire is completed and included with your records

Client Name		Phone:	
Balance Date		Fax:	
		Email:	

To: Bishop Toomey & Pfeifer Limited

Terms of Engagement

I hereby instruct you to prepare our Taxation Returns for the 2014 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/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.

Signature _____ Date _____

Records Required	✓	Comments
Wages/National Superannuation/Benefits		
Please provide us with the names of any organisations you have received the following from: <ul style="list-style-type: none"> ▪ 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.	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	
Student Loan		
Do you have a student loan? If so, please provide your latest statement from IRD	<input type="checkbox"/>	
Interest and Dividends		
Please supply the advice slips. <ul style="list-style-type: none"> ▪ 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 	<input type="checkbox"/> <input type="checkbox"/>	
Rental and Leased Property		
Please complete attached rental questionnaire	<input type="checkbox"/>	
Partnerships, Trusts, Estates and Companies		
Please supply details of income earned from any entity for which we do not prepare the accounts and tax returns.	<input type="checkbox"/>	

Records Required	✓	Comments
Overseas		
<p>Include overseas interest, dividends, wages received and taxation paid. Note: New Zealand residents are liable for tax on all world-wide income.</p> <p>If Yes, please provide details of the value and quantity of the investments held at any time during the financial year. Please provide the date, value and details of any purchases, sales and income (dividends).</p> <p>Do you have rights in a Foreign Superannuation or Life Insurance Policy? If yes, please provide all details.</p> <p>Please attach all of your investments advisor's reports. This information is required so we can calculate if any income needs to be declared under the FIF (Foreign Investment Fund) rules.</p>	<input type="checkbox"/> <input type="checkbox"/>	
Insurance		
<p>Income Replacement Insurance Policy – provide details of:</p> <ul style="list-style-type: none"> ▪ Premiums paid during the year ▪ Any claims 	<input type="checkbox"/>	
Any Other Income		
<p>Look Through Company – if you have been allocated a share of a loss other than from a company that we are aware of, please provide details</p>	<input type="checkbox"/>	
Donations		
<p>Do you want us to complete your rebate claim form? Yes <input type="checkbox"/> No <input type="checkbox"/></p> <p>If so, please attach receipts.</p>		
Working for Families Tax Credits and Parental Tax Credit		
<p>Please supply full names and birth dates of all children. Please note the following:</p> <ul style="list-style-type: none"> ▪ 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 	<input type="checkbox"/>	
<p><u>Child's Name</u></p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p>	<p><u>IRD No.</u></p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p>	<p><u>Date of Birth</u> <u>Date left School</u></p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p>

