

PERSONAL INFORMATION QUESTIONNAIRE

FOR PREPARATION OF ANNUAL ACCOUNTS AND TAX RETURN

NAME:..... **PHONE NO.:**.....

BALANCE DATE:/...../.....

Your income tax return date is approaching and this questionnaire should be completed and returned along with the requested material as soon as possible. We would appreciate you taking the time to complete this questionnaire as it is a **very important part of the accounting process**. It will help you to:

- + Identify and provide the information we need to prepare your financial accounts.
- + Minimise the queries from us during the preparation of your financial accounts.

It also helps us meet the quality control standards that are required of us as members of the New Zealand Institute of Chartered Accountants.

Personal Section

1)	<p>Income</p> <p>Did you receive any income from paid wages / superannuation during the year? YES / NO</p> <p>We will obtain these details from Inland Revenue Department.</p>																																										
2)	<p>Other Income</p> <p>Did you receive any other income, for example, investments (dividends or interest) estates or trusts, overseas, annuity or pension? If yes, please record details below</p> <table style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 35%; text-align: left;">Payer of Interest</th> <th style="width: 30%; text-align: left;">Gross Interest</th> <th style="width: 35%; text-align: left;">Withholding Tax</th> </tr> </thead> <tbody> <tr><td>.....</td><td>.....</td><td>.....</td></tr> <tr><td>.....</td><td>.....</td><td>.....</td></tr> <tr><td>.....</td><td>.....</td><td>.....</td></tr> <tr><td>.....</td><td>.....</td><td>.....</td></tr> <tr><td>.....</td><td>.....</td><td>.....</td></tr> </tbody> </table> <table style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 25%; text-align: left;">Payer of Dividend</th> <th style="width: 20%; text-align: left;">Gross Dividend</th> <th style="width: 20%; text-align: left;">Imputation Credits</th> <th style="width: 35%; text-align: left;">Withholding Tax</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> </tbody> </table> <p>Other Income</p> <p>.....</p> <p>.....</p> <p>.....</p> <p>.....</p> <p>.....</p>	Payer of Interest	Gross Interest	Withholding Tax	Payer of Dividend	Gross Dividend	Imputation Credits	Withholding Tax
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3)	<p>Family Assistance</p> <p>To enable us to calculate your entitlement, please record details below including names, IRD No. and dates of birth of your children and the date that any of them left school:</p> <p>.....</p> <p>.....</p> <p>.....</p> <p>.....</p> <p>Are you eligible for Working for Families Tax Credits?</p> <p>.....</p>
4)	<p>Return Preparation Expenses</p> <p>Please advise any of the following that apply:</p> <p>(a) Fee for completing your last tax return (if not completed by Oldershaw & Co Ltd) \$.....</p> <p>(b) Commission paid on interest or dividend income \$.....</p> <p>(c) Interest on money borrowed to buy shares or to invest \$.....</p> <p>(d) Premiums or loss of earnings insurance provided the benefit from the policy is taxable \$.....</p> <p>(e) Monitoring fees for investment portfolios \$.....</p>
5)	<p>Rebate Claim</p> <p>Did you make charitable donations to an approved charity? <i>Please attach receipts</i> YES / NO</p> <p>Did you pay for childcare or a housekeeper? <i>Please attach receipts</i> YES / NO</p>