Business Income & Expense Questionnaire – 31st March 2009

Please ensure this questionnaire is completed and included with your records

Client Name:		Phone:	[Business or Home]
Address:		Mobile:	
		Fax:	
Balance Date:	31st March 2009	Email:	

To: Derrick P. Storey & Associates Limited

Please find following all the information necessary to prepare a Business Income & Expense Schedule as part of the preparation of my Taxation Return for the year ended 31st March 2009.

Signature _____ Date _____ / _____ / _____

Records Required	Comments
Income	
For each of the organisations you have received income from, please provide us with the following: • Name • Gross Income Received • Withholding Tax Deducted In most cases the IRD will have sent us these details directly. However we do need to check that all details have been included.	
Expenditure	

Please supply a list of expenditure incurred in producing the above income.

_____	$_____	_____	$_____
_____	$_____	_____	$_____
_____	$_____	_____	$_____
_____	$_____	_____	$_____
_____	$_____	_____	$_____
_____	$_____	_____	$_____
_____	$_____	_____	$_____
_____	$_____	_____	$_____
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_____	$_____	_____	$_____
_____	$_____	_____	$_____
_____	$_____	_____	$_____
_____	$_____	_____	$_____
_____	$_____	_____	$_____
_____	$_____	_____	$_____

Motor Vehicles

The proportion of motor vehicle business use as established by your vehicle log book(s) is/are:

Vehicle Description: _____

Business	_____	km
Total	_____	km
Percentage Business	_____	%

Vehicle Description: _____

Business	_____	km
Total	_____	km
Percentage Business	_____	%

§ Please note that a detailed and accurate log book must be completed for a three month period every three years. Otherwise vehicle expense claims will be limited to a maximum of 25% of expenses incurred.

Home Office Expenses

If part of your home is set aside principally for use as an office/workshop/storage area, please provide the following details:

Business Area: _____ m²

Total Area: _____ m²

Power	$_____
Insurance (Building & Contents)	$_____
Interest (House Mortgage)	$_____
Rates	$_____
Repairs & Maintenance	$_____
Other	$_____
Total	**$**_____
Cost of House and Section	$_____
Cost of Section	$_____

Construction materials: (timber, brick, etc)

_____

Any other information that will assist us in the preparation of your Tax Return

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