



Individual 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

Terms of Engagement

I hereby instruct you to prepare my Taxation Return, including Schedules as indicated, for the 31st March 2009 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 carrying 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 Derrick P. Storey & Associates Limited has 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 the discretion of Derrick P. Storey & Associates Limited. I accept that any collection costs incurred by Derrick P. Storey & Associates Limited will be fully recoverable from me.

Signature _____ Date ____ / ____ / ____

Records Required	Ü	Comments
Wages/National Superannuation/Benefits		
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 the IRD will have sent us these details directly. However we do need to check that all details have been included.	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	
Interest and Dividends		
Please supply the advice slips. § For interest received, you should have an annual advice notice showing the gross amount received and the withholding tax deducted. This may be on the bottom of your Bank Statement dated 31 March. § For dividends received, you should have advice notices showing the gross dividend, imputation credits &/or withholding tax deducted. § If any dividends are taken as bonus shares, also include these advice slips.	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	
Overseas Income		
Include overseas interest, dividends, wages received and taxation paid. Note: New Zealand residents are liable for tax on all world-wide income.	<input type="checkbox"/>	

Rental and Leased Property			
Please complete the Rental Questionnaire	<input type="checkbox"/>		
Self-Employed Business Income & Expenses			
Please complete the Business Income & Expense Questionnaire	<input type="checkbox"/>		
Partnerships, Trusts, Estates and Companies			
Please supply details of income received.	<input type="checkbox"/>		
Any Other Income			
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	<input type="checkbox"/> <input type="checkbox"/>		
Donations, Housekeeping and Childcare Tax Rebates			
Have you any rebates to claim?.....Yes <input type="checkbox"/> No <input type="checkbox"/> If Yes, have you sent your rebate claim form to Inland Revenue?.. Yes <input type="checkbox"/> No <input type="checkbox"/> Do you want us to complete your rebate claim form?.....Yes <input type="checkbox"/> No <input type="checkbox"/>			
Family Assistance and Parental Tax Credit			
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 a copy of the child's birth certificate, or record their IRD Number below. § 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 Family Assistance 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.	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>		
<u>Child's Name</u>	<u>IRD No.</u>	<u>Date of Birth</u>	<u>Date Left School</u>
_____	- - -	/ /	/ /
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Bank Account (for tax refunds)			
Please <u>attach</u> a bank deposit slip, or enter your bank account details here	<input type="checkbox"/>	- - -	

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