

## Individual Questionnaire – 2011

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**Ensure this questionnaire is completed and included with your records**

Client Name:		Phone:	
Balance Date:	31 March 2011	Fax:	
Email:			

To: Marriotts

**Terms of Engagement**

I hereby instruct you to prepare my Taxation Return. I undertake to supply all information necessary to carry out the preparation of my Taxation Return. You are not to complete an audit, nor do I wish you to undertake a detailed review of my affairs in order to substantiate the accuracy of my information. I accept responsibility 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.

**FOR US TO START PREPARING YOUR FINANCIAL STATEMENTS AND TAX RETURNS WE NEED YOU TO PLEASE SIGN THIS AUTHORISATION.**

I authorise you to act as Agent for Inland Revenue Department matters.

Signature \_\_\_\_\_

Date \_\_\_\_\_

Has the nature of your business changed in any way during the past 12 months? If yes, please provide brief details:

Please provide details of anything we should be aware of in relation to the preparation of your accounts.

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## Records Required

If we input your data throughout the year for GST purposes please go straight to question three.

### 1. Wages/National Superannuation/Benefits

Please tick If Applicable

Please provide us with the names of people or entities you have received the following from:

<ul style="list-style-type: none"><li>• Wages</li></ul>	<hr/>	<input type="checkbox"/>
<ul style="list-style-type: none"><li>• Withholding Tax Income</li></ul>	<hr/>	<input type="checkbox"/>

Have you received any of the following:

<ul style="list-style-type: none"><li>• ACC Payments</li></ul>		<input type="checkbox"/>
<ul style="list-style-type: none"><li>• National Superannuation</li></ul>		<input type="checkbox"/>
<ul style="list-style-type: none"><li>• Any other benefits</li></ul>		<input type="checkbox"/>

**Please note: In most cases the IRD will have sent us these details direct. However we do need to check all details have been included.**

### 2. Interest and Dividend Certificates

Please provide the following information:

<ul style="list-style-type: none"><li>•</li></ul>	Copies of all annual interest received certificates showing RWT deducted	<input type="checkbox"/>
<ul style="list-style-type: none"><li>•</li></ul>	All copies of dividend statements received during the year, including bonus share advice slips	<input type="checkbox"/>

### 3. Partnerships, Trusts, Estates and Companies

Please supply details of income received from any partnership, trust, estate or company of which Marriotts does not prepare the accounts or tax returns for.
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#### 4. Overseas Income

Please include details of overseas income received during the tax year, including employment income, as well as taxation paid on this income. New Zealand tax residents are liable for tax on all worldwide income. We set out below further details required in respect to financial investments.

#### 5. New Foreign Investment Fund Rules (FIF)

New rules have been introduced starting from the 2008 tax year that requires us to undertake calculations on various investments (e.g. private companies, listed companies, other listed investments, unit trusts, insurance policies or super schemes). The following questions will assist us in determining whether these rules apply to you.

Do you own a 10% or more interest in an overseas entity? Yes  No

Do you own an interest of less than 10% in an overseas entity? Yes  No

If the answer is yes to either question, we will need to contact you to arrange a time to discuss the taxation on these investments.

#### 6. Any Other Income

Please provide the following information or details:

- Income Replacement Insurance Policy (include premiums & claims)
- Loss Attributing Qualifying Company (if it is for a company we do not act for)
- Income protection insurance (Please provide certificate)

#### 7. Donations, Housekeeping and Childcare Tax Rebates

If you would like us to prepare your rebate claim form please provide all your donation and childcare receipts. You need to provide receipts in order to claim the rebates.

### 8. Working for Families and Parental Tax Credit

Please supply full names and birth dates of all children who are under the age of 18, still at school or are not financially independent (full time employment). 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 their IRD number if you already have one.

Child's Name	Date of Birth	IRD Number	Date Left School
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Did you receive Working for Families during the year? Please provide certificate issued Yes  No

Please also provide details of any maintenance payments made or received

### Taxpayer Obligations

**Please note:**

The IRD has rules and procedures in regard to the filing of returns by due dates and interest charges for non paid or underpaid tax.

The IRD has the discretion to impose a late filing penalty if you fail to file a return after receiving notification from them that it is due.

**To ensure that you meet your obligations please have your records to us promptly.**

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