

**INDIVIDUAL QUESTIONNAIRE
FOR THE 2011 FINANCIAL YEAR**

NAME:

PERSONAL INFORMATION FOR TAX RETURNS

<p>1. Income with Tax Deducted</p>	<p>Did you receive any income from which tax was deducted?</p> <p>Salary or Wages Income Tested Benefits Accident Compensation National Superannuation Other Pension/Superannuation Schemes</p> <p>The IRD Summary of Earnings will be sent directly to us</p> <p>If you received Family Support during the year, please enclose the certificate received from the Inland Revenue Department and any other relevant information.</p>	<p>YES / NO</p>	
<p>2. Interest Received</p>	<p>Did you receive any interest during the year? Please enclose Certificates as they include details for the <u>whole</u> year.</p> <p><u>Source of Interest</u></p> <p>.....</p> <p>.....</p>	<p>YES / NO</p>	
<p>3. Dividends Received</p>	<p>Did you receive any dividends during the year? Please enclose certificates, including those for shares in lieu of dividends.</p> <p><u>Source of Dividends</u></p> <p>.....</p> <p>.....</p>	<p>YES / NO</p>	
<p>4. Overseas Income</p>	<p>Did you receive any overseas income during year? Please supply details of any such income.</p> <p><u>Source of Income</u></p> <p>.....</p> <p>.....</p>	<p>YES / NO</p>	

5. Other Income	<p>Did you receive any other income during the year? If from a partnership, trust, or an estate, please supply the following details:</p> <p>Name of Entity:</p> <p>IRD No:</p> <p>Share of Profit/Loss</p> <p>Please supply details of any other income:</p>	YES / NO									
6. Childcare/Housekeeper and Charitable Donations	<p>These are now claimed on a separate Rebates Return. We will complete and file these returns if required. Please indicate if you have already filed your own rebate claim return.</p> <p>Do you require us to complete your rebate claim return?</p> <p>If Yes – please include details of your donations (receipts) and/or childcare/housekeeper.</p>	YES / NO									
7. Working for Families Tax Credits (WFFTC)	<p>Did you receive WFFTC or are entitled to it as an end of year adjustment?</p> <p>If yes, please supply the following details:</p> <table border="0" data-bbox="646 982 1323 1245"> <tr> <td><u>Names of Children</u></td> <td><u>Date of Birth</u></td> </tr> <tr> <td>.....</td> <td>.....</td> </tr> <tr> <td>.....</td> <td>.....</td> </tr> <tr> <td>.....</td> <td>.....</td> </tr> </table> <p>Please supply full details of any children born during the year, and those who left school during the year.</p>	<u>Names of Children</u>	<u>Date of Birth</u>	YES / NO	
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8. Instructions / Authorisation for BTA Ltd

I instruct BTA Ltd to prepare my taxation return for the 2011 financial year. I undertake to supply all information necessary for this engagement and to be responsible for the accuracy and completeness of such information. Your services are not intended to and accordingly will not result in the expression by you of an opinion on the tax return summary or related schedules insofar as third parties are concerned.

Authorisation to obtain information subject to the Privacy Act

I authorise BTA Ltd to communicate with the appropriate bankers, solicitors, finance companies and other persons or organisations to obtain such further information as is required to carry out the above engagement.

Signature _____ Date _____
(please sign here)