

INDIVIDUAL QUESTIONNAIRE

NAME: **FINANCIAL YEAR ENDED:**

PERSONAL INFORMATION FOR TAX RETURNS

1. Income with Tax Deducted	<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>	YES / NO
2. Interest Received	<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>	YES / NO
3. Dividends Received	<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>	YES / NO
4. Overseas Income	<p>Did you receive any overseas income during the year? Please supply details of any such income</p> <p>Examples below of income and information required. Overseas interest, dividends, wages received, and taxation paid Any overseas investments held during the year and all reports relating to them Interest in a foreign company, unit trust, life insurance policy or superannuation schemes</p>	YES / NO
5. Other Income or Loss	<p>Did you receive any other income or loss during the year? If from a partnership, trust, look-through company, or an estate, please supply the following details:</p> <p>Name of Entity: _____ IRD No: _____ Share of Profit/Loss: _____ Please supply details of any other income: _____</p>	YES / NO

6. Charitable Donations	<p>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? If Yes – please include details of your donations (receipts)</p>	YES / NO						
7. Expenses	Attach details of expenses incurred in earning income (other than your PAYE/employment income) Examples are income protection insurance, commissions, interest on loans used to buy investments.							
8. 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 style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%;"><u>Names of Children</u></td> <td style="width: 50%;"><u>Date of Birth</u></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> <p>If you answer Yes to ANY of the questions below– please include details on a separate sheet.</p>	<u>Names of Children</u>	<u>Date of Birth</u>	_____	_____	_____	_____	YES / NO
<u>Names of Children</u>	<u>Date of Birth</u>							
_____	_____							
_____	_____							
Other Income for WFFTC								
	Attributable trustee income of trusts where you are the Settlor	YES / NO						
	Attributable fringe benefits	YES / NO						
	PIE income	YES / NO						
	Passive income from children if over \$500 per year per child	YES / NO						
	Income from non-resident spouse	YES / NO						
	Tax exempt salary & wages	YES / NO						
	Pensions & Annuities	YES / NO						
	Income Equalisation Scheme Deposits	YES / NO						
	Royalties	YES / NO						
	Income held in closely held companies	YES / NO						
	Maori Authority	YES / NO						
	Other payments received over \$5,000 per year used for day to day expenses	YES / NO						
9. Provisional Tax	Do you know of anything that may cause the coming year's provisional tax to be significantly different to the current year?							
10. Refund Bank Account	<p>Please provide the bank account name and number that should there be a refund you would like it to be deposited into</p> <p>Bank account number.....</p> <p>Bank account name.....</p>							
11. General	Is there anything else you consider relevant							
							
							
							

12. Address confirmation	Please confirm your current postal address below 	
13. Meeting	Once your financial statements and/or tax returns are complete, do you wish to have a meeting to discuss them?	YES / NO

14. Instructions / Authorisation for BTA Ltd

I instruct BTA Ltd to prepare my taxation return. 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 _____