

WBB 2020 Individual Questionnaire

Ensure this questionnaire is completed and included with your records and please don't forget to sign on the back.

Client Name		Balance Date	31/03/2020
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YES NO

Please complete details on this form where possible	
Did you receive income from wages/salaries/national superannuation/WINZ/ACC payments?	<input type="checkbox"/>
Did you receive income from employment with withholding tax deducted? <i>If yes, please complete our separate Business Questionnaire.</i>	<input type="checkbox"/>
Did you have a share of partnership income/loss? <i>Name of Partnership</i> _____	<input type="checkbox"/>
Did you receive a shareholder salary with no tax deducted, or own shares in a QC/LTC? <i>Name of Company</i> _____	<input type="checkbox"/>
Have you received any interest or dividend income? <i>If yes, please attach interest and dividend certificates.</i>	<input type="checkbox"/>
Do you have any investments in shares etc? <i>If yes, please attach details.</i>	<input type="checkbox"/>
Did you receive any income from an Estate or Trust? <i>Name of Estate/Trust</i> _____	<input type="checkbox"/>
Do you have any overseas bank accounts, or any interest in overseas companies, unit trusts, life assurance policies or superannuation funds, or receive any other form of overseas income? <i>If yes, please attach details.</i>	<input type="checkbox"/>
Did you receive any rent from properties? <i>If yes, please complete separate Rental Questionnaire.</i>	<input type="checkbox"/>
Working for Families: <ul style="list-style-type: none"> • Are you registered for Working for Families? <input type="checkbox"/> • Do you have children or did you have a child during the year to 31 March 2020? <input type="checkbox"/> 	
Do you have a property (such as a holiday home), a boat (with a market value of \$50,000 or greater) or a plane (with a market value of \$50,000 or greater) that is used privately and also to derive income? <i>If yes, please complete separate Mixed use Holiday Home/Boat/Plane Questionnaire.</i>	<input type="checkbox"/>
Bright-Line Test for Sale of Residential Property <ul style="list-style-type: none"> • Have you purchased and sold a residential property since 1 October 2015 which is not your main residence? <input type="checkbox"/> • Have you sold residential property in New Zealand where Residential Land Withholding Tax has been deducted and paid to the IRD? <input type="checkbox"/> 	
Did you receive any other income from any other source? <i>If yes, please attach details.</i>	<input type="checkbox"/>
Did you pay premiums for income protection insurance? <i>If yes, please attach a copy of the confirmation letter from your insurer, of the premiums paid and any claims.</i>	<input type="checkbox"/>
Do you have a student loan? <i>If yes, please attach a copy of the latest Statement of Account received from IRD.</i>	<input type="checkbox"/>

<p>Have you made any donations or given any unconditional gifts to Charities, Schools, Religious Organisations or Sporting Organisations over \$5.00?</p> <p><i>If yes, do you want us to complete your rebate claim form? Please attach receipts.</i> Yes <input type="checkbox"/> No <input type="checkbox"/></p>	<input type="checkbox"/>
<p>Are you in Kiwisaver? <i>If yes, please provide evidence to confirm your PIR rate.</i></p>	<input type="checkbox"/>
<p>Tax refund due this year? <i>If your tax return results in a tax refund this year we will need to provide a bank account number to IRD that they can use to deposit your refund into. Please supply below or on a separate sheet:</i></p> <ul style="list-style-type: none"> • Name of Bank Account..... • Bank Account number..... 	<input type="checkbox"/>
<p>OTHER INFORMATION If you have any other information, which you feel may be relevant to, or included in your tax return that has not been included in the above questions, please attach full details.</p> <hr/> <hr/> <hr/> <hr/>	<input type="checkbox"/>

To WBB Chartered Accountants Limited

Terms of Engagement

I hereby instruct you to prepare my Taxation Return for the 2020 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 carry out the above assignments. I authorise you to obtain information from Inland Revenue about all tax types except child support (NCP or CPR) in order to complete the above assignments. This includes obtaining information through all Inland Revenue media and communication channels.

Where I have also instructed you to prepare my GST Returns on a regular basis. I accept that it is my responsibility to advise you of all relevant transactions on a timely basis as well as obtain valid tax invoices that comply with the GST legislation.

All other terms and conditions of this engagement are the same as those referred to in my most recent Engagement Letter.

I understand that each year I will be provided with a Fee Agreement. The fees are payable as per the agreed Fee Agreement.

You are to represent me as my tax agent. All income tax returns will be signed by me.

Name- please print

Signature

Date