

## Individual Questionnaire – 1 April 2020 to 31 March 2021

Ensure this questionnaire is completed and included with your records

Client Name:		Phone:	
Balance Date:		Email:	

To: Toni Walker Limited

### **Terms of Engagement**

I hereby instruct you Toni Walker Limited and staff as applicable to prepare my Taxation Returns for the 2021 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.

Authority is given to obtain information from Inland Revenue, ACC and other government agencies and financial institutions about all tax types (except child support), bank and loan accounts in order to complete the above assignments. This includes obtaining information through all Inland Revenue media and communication channels including electronic ones.

You are to represent me as my tax agent. All income tax returns will be signed by me however you are authorised to sign any other taxation return on behalf of myself or any of my associated entities.

Signature:	Date:
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Records Required	✓	Comments
<b>Wages/National Superannuation/Benefits</b>		
Please provide us with the names of any organisations you have received the following from: <ul style="list-style-type: none"> <li>▪ Wages</li> <li>▪ ACC payments</li> <li>▪ National Superannuation</li> <li>▪</li> <li>▪ Any other benefits</li> </ul> In most cases IRD will have sent us these details direct, however we do need to check all details have been included.	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	
<b>Interest and Dividends</b>		
Please supply the advice slips. <ul style="list-style-type: none"> <li>▪ For interest received, you should have an annual advice notice showing the withholding tax deducted. This may be on the bottom of your bank statement dated 31 March</li> <li>▪ If any dividends are taken as bonus shares, also include these advice slips</li> </ul>	<input type="checkbox"/> <input type="checkbox"/>	
<b>Rental and Leased Property</b>		
Please complete a separate rental questionnaire	<input type="checkbox"/>	
<b>Partnerships, Trusts, Estates and Companies</b>		
Please supply details of income earned from any entity for which we do not prepare the accounts and tax returns.	<input type="checkbox"/>	
<b>Overseas</b>		
<ul style="list-style-type: none"> <li>▪ Supply details of overseas interest, dividends, wages received and taxation paid</li> <li>▪ Provide details of any overseas investments held at any time during the financial year</li> <li>▪ Attach all of your investments advisor's reports</li> </ul>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	
<b>Any Other Income</b>		
Attach details: <ul style="list-style-type: none"> <li>▪ Income Replacement Insurance Policy – provide details of premiums and claims</li> <li>▪ Look Through Company – if you have been allocated a share of a loss other than from a company that we are aware of, please provide details</li> <li>▪ Did you receive non-taxable income from any other sources? If Yes, please provide details.</li> </ul>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	
<b>Donations</b>		
Do you want us to complete your rebate claim form? Yes <input type="checkbox"/> No <input type="checkbox"/> If so, please attach receipts.	<input type="checkbox"/>	

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