

# Individual Questionnaire – Investor

## For the year ended 31<sup>st</sup> March 2018

Please ensure this questionnaire is completed and included with your records

Client Name:		Phone:
Balance Date:		Cellphone:
Email:		Convenient time to call:
Physical Address:		
Postal Address:		

To: Tax Matters Limited

You are hereby authorised to communicate with my/our bankers, solicitors, finance companies and all government agencies to obtain such information as you require in order to carry out the preparation of my/our financial statements and tax returns.

I/We authorise you to act as my/our Agent for Inland Revenue Department matters, and to have access to all tax types and all tax information pertinent to the completion of my financial statements and tax returns.

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Records Required From 1 <sup>st</sup> April 2017 to 31 <sup>st</sup> March 2018	<input checked="" type="checkbox"/>	Comment
<b>Interest Received</b>		
An RWT Deduction Certificate (IR15) will be sent to you by your bank, or other financial institutions, indicating the amount of tax deducted from interest received. We require these for joint accounts also.	<input type="checkbox"/>	
<b>Dividends Received</b>		
A dividend payment advice will accompany dividend cheques indicating withholding tax deductions or imputation credits	<input type="checkbox"/>	
<b>Other Income &amp; Expenses – please attach</b>		
<b>Self Employed Income</b> Please complete Sole Trader Questionnaire	<input type="checkbox"/>	

<b>Rents Received</b>	<input type="checkbox"/>	
Please complete Rental Questionnaire		
<b>Partnerships/Trusts/Estates/Other Companies</b>	<input type="checkbox"/>	
Income from Partnerships/Trusts/Estates/Other Companies, where accounts are prepared by another accountant		
<b>Investment Portfolios</b>	<input type="checkbox"/>	
Copy of investment portfolio		
<b>New Zealand Investments</b>	<input type="checkbox"/>	
Details of all New Zealand Investments		
<b>Overseas Investments</b>	<input type="checkbox"/>	
Details of all foreign investments and income		
<b>Income Protection Insurance</b>	<input type="checkbox"/>	
Please supply details of Income Protection Insurance paid during the financial year		
<b>Other Expenses</b>	<input type="checkbox"/>	
Please supply details of any other expenses incurred e.g Accounting or Portfolio fees		
<b>Donations</b>		
Attach all receipts for donations to schools, churches, charitable organisations. Minimum donation is \$5.	<input type="checkbox"/>	\$ _____
<b>Working for Families Tax Credits</b>		
Please supply full names and birth dates for all children. Note the following;	<input type="checkbox"/>	
<ul style="list-style-type: none"> <li>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 <b>OR</b> their IRD number if you already have one.</li> </ul>	<input type="checkbox"/>	
<ul style="list-style-type: none"> <li>Where a child became financially independent during the current financial year, please advise the date they left school.</li> </ul>	<input type="checkbox"/>	
Please provide details of any maintenance payments made or received during the year.	<input type="checkbox"/>	

