Individual Questionnaire – Investor For the year ended 31st March 2024



Please ensure this questionnaire is completed and included with your records

Client Name:	F	Phone:				
Balance Date:		Cellphor	ne:			
Email:						
Physical Address:						
Postal Address:						
government agenc	nited uthorised to communicate with my/our bank, solies to obtain such information as you require in catements 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		√	Comment			
Interest Received						
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.						
Dividends Received						
A dividend paymen withholding tax dec	t advice will accompany dividend cheques indicating ductions or imputation credits. Note payment dates 1/4/2023 and 31/3/2024	g 🗆				
Other Income & Ex	penses – please attach		1			
Self Employed Inco Please complete Sc	me lle Trader Questionnaire					
Rents Received						

Partnerships/Trusts/Estates/Other Companies Income from Partnerships/Trusts/Estates/Other Companies, where accounts are prepared by another accountant		
Investment Portfolios Copy of investment portfolio including fees paid.		
New Zealand Investments Details of all New Zealand Investments		
Overseas Income Details of all foreign investments and pensions.		
Income Protection Insurance Please supply details of Income Protection Insurance paid during the financial year		
Other Expenses Please supply details of any other expenses incurred e.g Accounting		
Donations	Т	
Attach all receipts for donations to schools, churches, charitable		\$
organisations. Minimum donation is \$5. Note, receipts must be signed by an authorised person & show a stamp or letterhead.		
organisations. Minimum donation is \$5. Note, receipts must be signed		
organisations. Minimum donation is \$5. Note, receipts must be signed by an authorised person & show a stamp or letterhead. Working for Families Tax Credits Please supply full names and birth dates for all children. Note the following;		
organisations. Minimum donation is \$5. Note, receipts must be signed by an authorised person & show a stamp or letterhead. Working for Families Tax Credits Please supply full names and birth dates for all children. Note the following; 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 OR their IRD number if you already have one.		
organisations. Minimum donation is \$5. Note, receipts must be signed by an authorised person & show a stamp or letterhead. Working for Families Tax Credits Please supply full names and birth dates for all children. Note the following; 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 OR their IRD number if you already have		

<u>Childs Name</u>	IRD No.	Date of Birth	Date left School			
Other Information						
Details of anything else we should be aware of in relation to the preparation of your accounts						
We will email you a PDF copy of your accounts. If you require a printed copy, please advise.						
we will email you a PDF copy of your accounts. If you require a printed copy, please advise.						
☐ Accounts bound and posted						

If you have any questions regarding this form, please do not hesitate to contact us:

Please return this slip and all necessary documents to us in person at our physical address, via post or email.

Tax Matters Limited

Physical: Unit 3/245 St Asaph Street Christchurch 8011 or

Postal: P O Box 13400, City East, Christchurch 8141

Phone: (03) 366 6115 Fax: (03) 366 4798

Email: debbie@taxmatters.net.nz

Thank you for completing this questionnaire Don't forget to sign on page 1

Can we assist you in any way, or is anything you would like to discuss:		
Assistance with tax planning		
Would you like Tax Matters to look after GST/RWT/Payroll returns (if not already)		
Assistance with budgets / cashflow forecast		
Preparation of regular financial reports (monthly, quarterly)		
Regular meetings to improve business performance		
Identifying your future direction with a strategic plan and a business plan		
Assistance with a succession plan		
Preparation of business for sale		
Due diligence for purchase of a business		
Any accounts receivable issues you would like assistance with resolving / collection		
Funding requirements, working capital or asset finance		
Any specific business problems you would like to discuss, or matters you wish to		
raise		