

Individual Questionnaire – 31 March 2019

Ensure this questionnaire is completed and included with your records

PLEASE ENSURE you fill out the CLIENT NAME box & SIGN the document. (Only fill in any contact details that might have changed recently or you want to reconfirm contact details.)

Client Name		Phone:	
Balance Date	31 March 2019	Fax:	
		Email:	

To: Co-Pilot Accounting Limited

Terms of Engagement

I hereby instruct you to prepare our Taxation Returns for the 2019 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 complete 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.

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

I also accept that Co-Pilot Accounting Limited has the right to charge interest on overdue accounts at the rate of 2% per month, and that all accounts are due for payment by the 20th of the month following invoice date. The charging of such interest will be at the discretion of Co-Pilot Accounting Limited. I accept that any collection costs incurred by Co-Pilot Accounting Limited will be fully recoverable from me. I also accept that if I am entitled to any refunds from the Inland Revenue Department, Co-Pilot Accounting Limited may deduct their accountancy fees from that refund if accountancy fees are owing at the time the refund is received. These refunds will be banked into the ASB Co-Pilot Accounting Limited Trust Account, and then a cheque will be written out to Co-Pilot Accounting Limited. We will be supplying you with a statement of transactions for any monies gone through the Co-Pilot Accounting Limited Trust Account for the year ended 31 March 2019, the month after the end of the current financial year.

Signature _____

Date _____

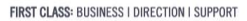
Records Required	✓	Comments
Bank Account for Refunds		
Bank account number for ALL REFUNDS _____	<input type="checkbox"/>	
Expenses		
Did you incur any expenses? If so, please provide invoices/source documents to verify. Examples are: Income Protection Insurance, Interest paid on funds borrowed for Business/Shares.	<input type="checkbox"/>	
Wages/National Superannuation/Benefits		
Please provide us with the names of any organisations you have received the following from: <ul style="list-style-type: none"> ▪ Wages ▪ ACC payments ▪ National Superannuation ▪ Any other benefits 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"/>	
Student Loan		
Do you have a student loan? If so, please provide your latest statement from IRD	<input type="checkbox"/>	
Interest and Dividends		
Please supply the advice slips. <ul style="list-style-type: none"> ▪ 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 ▪ If any dividends are taken as bonus shares, also include these advice slips 	<input type="checkbox"/> <input type="checkbox"/>	
Rental and Leased Property		
Please complete an additional rental questionnaire	<input type="checkbox"/>	
Partnerships, Trusts, Estates and Companies		
Please supply details of income earned from any entity for which we do not prepare the accounts and tax returns.	<input type="checkbox"/>	
Overseas		
<ul style="list-style-type: none"> ▪ Supply details of overseas interest, dividends, wages received and taxation paid ▪ Provide details of any overseas investments held at any time during the financial year ▪ Attach all of your investments advisor's reports ▪ Have you at any point in your lifetime, ever contributed to a foreign superannuation scheme, even if you cannot receive the benefits until you retire? 	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	

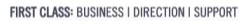
Records Required	✓	Comments	
Any Other Income			
<p>Attach details:</p> <ul style="list-style-type: none"> Income Replacement Insurance Policy – provide details of premiums and claims Look Through Company – if you have been allocated a share of a loss other than from a company that we are aware of, please provide details 	<input type="checkbox"/>		
Donations			
<p>Do you want us to complete your rebate claim form? Yes <input type="checkbox"/> No <input type="checkbox"/></p> <p>If so, please attach receipts.</p>	<input type="checkbox"/>		
Working for Families Tax Credits and Parental Tax Credit			
<p>Please supply full names and birth dates of all children. Please note the following:</p> <ul style="list-style-type: none"> If you had a child born within the current financial year you may be eligible for the Parental Tax Credit. Please include their IRD Number below. If you do not have this you will need to obtain one for them in order to claim any entitlement for them Where a child has become financially independent during the current financial year, please advise the date they left school or home 	<input type="checkbox"/>		
<u>Child's Name</u>	<u>IRD No.</u>	<u>Date of Birth</u>	<u>Date left School</u>

Records Required	✓	Comments
Working for Families Tax Credits and Parental Tax Credit <i>(continued)</i>		
<p>If you have received Working for Families Tax Credits during the year, please supply the certificate issued to you by IRD, detailing the amounts.</p>	<input type="checkbox"/>	
<p>Also provide details of any child support or maintenance payments made or received.</p>	<input type="checkbox"/>	
<p>If we do not prepare your spouse or partner's taxation return, please provide us with details of their income.</p>	<input type="checkbox"/>	
<p>Have there been any changes to your family circumstances, including a change in responsibility for your dependent child(ren), you have married, separated or otherwise changed your family circumstances? If so, please provide details.</p>	<input type="checkbox"/>	
<p>Do you share custody of your child(ren) with anyone other than your partner? If so, please provide details.</p>	<input type="checkbox"/>	
<p>Did you work on average less than 20 hours per week if single or did you and your spouse / partner combined work less than 30 hours per week? If so, please provide details.</p>	<input type="checkbox"/>	

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