Individual Questionnaire - 31 March 2015 Ensure this questionnaire is completed and included with your records

		1		
Client Name		Pho	one:	
Balance Date		Fax	c:	
Dalarioc Date		Em	ail:	
To: Shore Chartered A	accountants Ltd			
Terms of Engagemen	<u>t</u>			
carry out such services authorised to communication	prepare our Taxation Returns for the 2015 year. I undertate, and will be responsible for the accuracy and completeness cate with my bankers, solicitors, finance companies and all uire in order to carry out the above assignments.	ss of s	such information	on. You are hereby
	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.			
accounts are due for pa	We also accept that you have the right to charge interest on overdue accounts at the rate of 1.5% per month, and that all accounts are due for payment by the 20 th of the month following invoice date. The charging of such interest will be at your scretion. I/We accept that any collection costs you incur will be fully recoverable from me/us.			
Signature	Date			
Records Requir	red	✓	Comments	
	uperannuation/Benefits			
Please provide us with following from: Wages	h the names of any organisations you have received the			
 ACC payments 				
National Superannu	uation			
 Any other benefits 				
In most cases IRD wil to check all details ha	I have sent us these details direct, however we do need ve been included.			
Student Loan				
Do you have a studen	nt Ioan?			
	our latest statement from IRD			
Interest and Divide	ends			
	d, you should have an annual advice notice showing the ucted. This may be on the bottom of your bank			
statement dated 31				
•				
Rental and Leased	Property	Ι		
	ched rental questionnaire			
Partnerships, Trus	sts, Estates and Companies	1	T	
Please supply details prepare the accounts	of income earned from any entity for which we do not and tax returns.			

Records Required	✓	/	Comments	
Overseas	•			
 Supply details of overseas interest, dividends, wages received taxation paid Provide details of any overseas investments held at any time financial year Attach all of your investments advisor's reports Have you at any point in your lifetime, ever contributed to a superannuation scheme, even if you cannot receive the ber retire? 	ne during the	_		
Any Other Income				
Attach details: Income Replacement Insurance Policy ⁻ provide details of policies claims Look Through Company ⁻ if you have been allocated a shar other than from a company that we are aware of, please provided in the provided share of the provided share of the provided in the provided share of the pro	e of a loss			
Donations		- 1		
Do you want us to complete your rebate claim form? Yes _ No If so, please attach receipts.				
Working for Families Tax Credits and Parental Tax Credit		- 1		
Please supply full names and birth dates of all children. Please refollowing: If you had a child born within the current financial year you may for the Parental Tax Credit. Please include their IRD Number I do not have this you will need to obtain one for them in order to entitlement for them Where a child has become financially independent during the of financial year, please advise the date they left school or home.	y be eligible below. If you o claim any			
Child's Name	RD No.		Date of Birth	Date left School

Records Required	√	Comments
Working for Families Tax Credits and Parental Tax Credit (continued)		
If you have received Working for Families Tax Credits during the year, please supply the certificate issued to you by IRD, detailing the amounts.		
Also provide details of any child support or maintenance payments made or received.		
If we do not prepare your spouse or partner's taxation return, please provide us with details of their income.		
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.		
Do you share custody of your child(ren) with anyone other than your partner? If so, please provide details.		
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.		
Additional income information - Working for Families Tax Credits	I	
For the year starting 1 April 2011 the definition of family income for Working for Families Tax Credits has been extended. You are now required to supply details of income received from the following sources:		
• Attributable trustee income Attributable trustee income is all income for the year of a trust that hasn't been distributed as beneficiary income. Trustee income will be attributed only to settlors of a trust. The settlors are individuals who establish or contribute funds to the trust.		
■ Attributable fringe benefits If you receive fringe benefits and you or your associates (e.g. the family trust) are shareholder-employees of the company you work for and you or your associates hold voting interests of 50% or more then you need to include the fringe benefits in your family income. The value of the fringe benefit is the tax-inclusive value of the benefit.		
■ PIE income This includes an amount of income attributed by a portfolio investment entity (PIE) to the principal caregiver or their spouse or partner, except if the PIE is a superannuation fund or a retirement savings scheme (e.g. KiwiSaver).		
■ Passive income of children This includes all passive income such as interest, rents or beneficiary income, received by a dependent child above a threshold of \$500 per year, per child.		
■ Income of non-resident spouse If your spouse or partner, who is not a tax resident, is earning an income overseas, from 1 April 2011 you will need to include their worldwide income as part of your family income.		
■ Tax exempt salary or wages This includes salary and wages that are exempt from income tax under specific international agreements in New Zealand. (e.g. employees of international organisations such as the United Nations or the Organisation for Economic Co-operation and Development (OECD).		
■ Pensions and annuities This includes 50% of the amount of pension or annuity payments from life insurance policies or a superannuation fund, (excluding NZ Super).		

Records Required	✓	Comments
Additional income information - Working for Families Tax Credits (c	ontinu	ued)
• Other payments These are payments from any other person or entities that are used for the family s day-to-day living expenses. If the total amount is more than \$5,000 for the tax year, then the total amount must be included as family income.		
 Income equalisation scheme deposits (excludes 'adverse events' deposits) This includes any deposits made by you, a company controlled by you or your trust to an agricultural, fishing or forestry business income equalisation scheme account at Inland Revenue. 		
Major Shareholder in a Close Company Shareholders owing at least 10% of a company where five or fewer shareholders own greater than 50% of the company will be required to include their proportionate share of net income of the company (in addition to dividends received from the company)		
 Certain distributions from superannuation schemes and retirement savings schemes This includes any deposits made by you, a company controlled by you or your trust to an agricultural, fishing or forestry business income equalisation scheme account at Inland Revenue 		
■ Fringe benefits to shareholders Shareholder employees owning 50% or more of the company (including interests of associated persons) will need to include attributable fringe benefits (i.e. motor vehicles, low interest loans, subsidised transport > \$1k, contributions to insurance/sicknesss/accident/death funds >\$1k and other benefits >\$2k)		
From the 2015 income year, non-controlling shareholders will be required to include motor vehicles (where the person would have been entitled to more employment income if they had not chosen the motor vehicle) and the value of short term charge facilities		
A detailed description and examples of above income types is available from the IRD website: http://www.ird.govt.nz/wff-tax-credits/entitlement/work-out/wfftc-entitlement-adjustments.html		

Mixed Use Holiday Home		
Do you have a property (such a	as a holiday home or a bach) that is used privately and	also to derive income?
		Yes ☐ No ☐
If yes, provide details of proper	ty:	
		V
Was the property empty for 62 days in the income year? If yes, please complete the following section so we can determine the amount of allow		Yes ☐ No ☐
	•	vasio addadiono.
Mixed Use Holiday Home	– Information Required	
The number of days the proper	ty was empty during the income year	
	was used by family or associated persons* during the i	ncome year
	rson received was less than 80% of market rate relatives, or if owned by an entity, persons associated with the	ne entity owning the property
Associated persons include close	relatives, of it owned by all entity, persons associated with the	ie entity owning the property
If there is more than one tenan	t who used the property through the year, please attack	h details.
Name of tenant:		
Relationship to owner (if any):		
Amount of rent they paid:	\$	
Dates rented (From: To)		
Expenses incurred in respect of	of the property (the list below is not exhaustive ⁻ details	of all expenses will be
required):	with property (the net select to the owneded to detaile	or all experieds will be
Cost of advertising for tenants		\$
Cost of repairing damages cau	sed by tenants	\$
Number of days spent in the pr	operty while repairing damages caused by tenants	
Mortgage interest		\$
Rates		\$
Insurance		\$
Repairs/maintenance for gener	ral wear and tear	\$
Other (please give details):		
,		

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