

# Client Questionnaire for Individuals

Please take the time to complete this Questionnaire as it is a very important part of the accounting process. It helps you:

- Identify and provide the information we need to prepare your financial accounts.
- Minimise the queries from us during the preparation of your financial accounts.

**Please complete the Authorisation below to enable us to complete your Financial Statements and Tax Returns**

## Authorisation

I/We authorise Winstone France Limited to complete the compilation of financial statements and other related tax returns for me/us for the 2020 financial year as per the existing terms of engagement. I/We understand that a compilation is limited to the collection, classification and summarisation of financial information supplied by me/us and does not involve the verification of that information. I/We do not require Winstone France Limited to carry out an audit or review assignment on the financial statements produced.

Pursuant to the Privacy Act 1993 I/we authorise Winstone France Limited to obtain whatever information is required from third parties to complete the preparation of my/our financial statements and tax returns and to obtain information from the Inland Revenue from time to time regarding my tax affairs on all tax types.

Client Signature (required)

\_\_\_\_\_

Date

\_\_\_\_\_

## Update of Personal Details

IRD # \_\_\_\_\_

Full Name \_\_\_\_\_

Postal Address \_\_\_\_\_

Home Address \_\_\_\_\_

Email Address \_\_\_\_\_

Home Phone \_\_\_\_\_ Fax \_\_\_\_\_

Work Phone \_\_\_\_\_ Mobile \_\_\_\_\_

### 1 Income

Did you receive any income from paid wages/ superannuation/ withholding tax? YES/NO  
If YES, the IRD will provide us with a summary of your earnings

### 2 Interest/Dividends/Investments

Did you receive any income from Interest, Dividends or Portfolio Investment Entities (PIE) or Foreign Investment Funds (FIF)? YES/NO  
If YES, please provide all statements, certificates, advices and or full advisor reports

Did you sell any shares during the year? YES/NO

### 3 Rental Property Income

Did you receive income from Rents? YES/NO  
If YES, please complete the following:

Address of Property \_\_\_\_\_

Number of weeks the Property was rented during the year \_\_\_\_\_

Rent Received \$ \_\_\_\_\_ provide any statements from rental agencies

Interest on Mortgage \$ \_\_\_\_\_

Insurance \$ \_\_\_\_\_

Rates \$ \_\_\_\_\_

Repairs & Maintenance \$ \_\_\_\_\_ please include invoices

Assets Purchased \$ \_\_\_\_\_ please include invoices

If you have purchased or sold the property during the 2020 financial year please provide the purchase/sale agreement and the solicitors settlement statement.  
If you have more than one property please provide the above information for each property on a separate sheet.

### 4 Earthquake (Rental Property)

Did you or will you receive any money from EQC/Insurance Proceeds including Business Interruption/Loss of Profits, Stock Losses, Property damage etc? YES/NO  
If YES, please provide all documentation

### 5 Other Income

Did you receive any income from Partnerships, Trusts, Estates, Overseas Pensions, LAQC Losses? YES/NO  
If YES, please provide details

### 6 Income Protection

Did you pay for any Income Protection Insurance? YES/NO  
If already claimed in your business expenses indicate NO  
If YES, please provide details or annual invoice.

**7 Interest Paid**

Did you pay interest on money borrowed to purchase shares or an interest in a business?  
If YES, please provide loan details or statements.

YES/NO

**8 Student Loan**

Did you have a student loan?

YES/NO

**9 Working for Families Tax Credits**

If you think you are eligible for Working for Families Tax Credits please complete the following:

Name of Child	IRD #	Date of Birth	Date left School
_____	_____	___/___/___	___/___/___
_____	_____	___/___/___	___/___/___
_____	_____	___/___/___	___/___/___
_____	_____	___/___/___	___/___/___

	Principal Carer	Partner
The number of weeks worked during the year	_____	_____
The average number of hours worked per week	_____	_____

Have you married, separated or otherwise changed your family circumstances during the past year?  
If YES, please provide details.

YES/NO

If we do not prepare the tax return for your partner please provide details of their income. \$ \_\_\_\_\_

Will any family member be attending university or polytechnic next year? YES/NO

**Please make sure you read the Notice of Entitlement letter you would have received from the Inland Revenue as it details what is included as Family Income.**

Please advise of any other Income to be treated as Family Income. \$ \_\_\_\_\_

**10 Donations**

Did you make any Donations to registered Charity Church or School during the year?  
If YES, please provide all receipts

YES/NO

**11 Bank Account**

Do you want your refund (if applicable) to be direct credited to your Bank if YES, supply full account number including Bank, Branch, Account and Suffix

YES/NO

Bank account \_\_\_\_\_  
Name of Account \_\_\_\_\_