

**INDIVIDUAL QUESTIONNAIRE**

**NAME:** ..... **FINANCIAL YEAR ENDED:** .....

**PERSONAL INFORMATION FOR TAX RETURNS**

<p>1. Income with Tax Deducted</p>	<p>Did you receive any income from which tax was deducted?</p> <p>Salary or Wages Income Tested Benefits Accident Compensation National Superannuation Other Pension/Superannuation Schemes</p> <p>The <b>IRD Summary of Earnings</b> will be sent directly to us</p>	<p>YES / NO</p>
<p>2. Interest Received</p>	<p>Did you receive any interest during the year? Please enclose Certificates as they include details for the <u>whole</u> year.</p> <p><u>Source of Interest</u></p> <p>_____</p> <p>_____</p>	<p>YES / NO</p>
<p>3. Dividends Received</p>	<p>Did you receive any dividends during the year? Please enclose certificates, including those for shares in lieu of dividends.</p> <p><u>Source of Dividends</u></p> <p>_____</p> <p>_____</p>	<p>YES / NO</p>
<p>4. Offshore equity investments</p>	<p>Offshore equity investments may be subject to tax under the Fair Dividend Rate (FDR) method of measuring income. Complex calculations may be required, although these may have been done for you already and summarized in a portfolio summary report provided by an investment manager or advisor.</p> <p>Please provide us with details of: All foreign equities owned during the year (name of entity, country of residence, number of shares/units, etc)</p> <p>Their cost price if acquired during the year or market value as at the start of that year if already owned.</p> <p>Any income distributions or sale proceeds received.</p>	<p>YES / NO</p>
<p>5. Overseas Income</p>	<p>Did you receive any overseas income during year? Please supply details of any such income.</p>	<p>YES / NO</p>

6. Other Income or Loss	<p>Did you receive any other income or loss during the year? If from a partnership, trust, look-through company or an estate, please supply the following details:</p> <p>Name of Entity: _____ IRD No: _____ Share of Profit/Loss _____ Please supply details of any other income: _____</p>	YES / NO
7. Charitable Donations	<p>We will complete and file these returns if required. Please indicate if you have already filed your own rebate claim return.</p> <p>Do you require us to complete your rebate claim return? If Yes – please include details of your donations (receipts)</p>	YES / NO
8. Expenses	<p>Attach details of expenses incurred in earning income (other than your PAYE/employment income) Examples are income protection insurance, commissions, interest on loans used to buy investments.</p>	
9. Working for Families Tax Credits (WFFTC)	<p>Did you receive WFFTC or are entitled to it as an end of year adjustment?</p> <p>If yes, please supply the following details: <u>Names of Children</u> _____ <u>Date of Birth</u> _____ _____ _____</p> <p>Please supply full details of any children born during the year, and those who left school during the year. <b>If you answer Yes to ANY of the questions below– please include details on a separate sheet.</b></p>	YES / NO
<b>Other Income for WFFTC</b>	<p>Attributable trustee income of trusts where you are the Settlor Attributable fringe benefits PIE income Passive income from children if over \$500 per year per child Income from non-resident spouse Tax exempt salary &amp; wages Pensions &amp; Annuities Income Equalisation Scheme Deposits Royalties Income held in closely held companies Maori Authority Other payments received over \$5,000 per year used for day to day expenses</p>	<p>YES / NO YES / NO YES / NO YES / NO YES / NO YES / NO YES / NO YES / NO YES / NO YES / NO YES / NO</p>
10. Provisional Tax	<p>Do you know of anything that may cause the coming year's provisional tax to be significantly different to the current year?</p>	
11. Refund Bank Account	<p>Please provide the bank account name and number that should there be a refund you would like it to be deposited into</p> <p>Bank account number..... Bank account name.....</p>	

**12. Instructions / Authorisation for BTA Ltd**

I instruct BTA Ltd to prepare my taxation return. I undertake to supply all information necessary for this engagement and to be responsible for the accuracy and completeness of such information. Your services are not intended to and accordingly will not result in the expression by you of an opinion on the tax return summary or related schedules insofar as third parties are concerned.

**Authorisation to obtain information subject to the Privacy Act**

I authorise BTA Ltd to communicate with the appropriate bankers, solicitors, finance companies and other persons or organisations to obtain such further information as is required to carry out the above engagement.

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