

Grace Team Accounting Limited 2011 Individual Questionnaire

		Self	Partner
1	Income: Did you receive any income from salary, wages, ACC, social welfare benefits, or superannuation? If you received a "Summary of Earnings" or "Personal Tax Summary" from the IRD please forward this to us. However, in most instances the IRD will send this direct to us as your tax agent.	YES / NO	YES / NO
2	Rebate Information: If you were employed or self employed, how many weeks of the year were you employed for at least 20 hours per week?	_____	_____
3	Interest and/or Dividend Income: Did you receive any interest and/or dividend income during the year? IF YES, please provide interest and dividend advice notices.	YES / NO	YES / NO
4	Business Income: Did you receive any income from self employment or partnership? IF YES, please complete the business checklist if we are completing these returns.	YES / NO	YES / NO
5	Trust, Estate or Overseas Income: Did you receive any other income, for example from: trusts, estates, overseas, annuity or pension? IF YES, please provide details including details of tax paid on your behalf.	YES / NO	YES / NO
6	Other Income: Did you receive any income: e.g. grants, royalties, cash tips, etc? IF YES, please provide details on a separate sheet.	YES / NO	YES / NO
7	Rental Income: Did you receive any rental income in your personal name? IF YES, please complete rental schedule form A (attached). (For Companies, our Business Checklist needs to be completed).	YES / NO	YES / NO
8	Income Protection Insurance: Do you have Income Protection Insurance? IF YES, please provide a copy of the invoice and policy and provide details of the premium paid.	YES / NO	YES / NO
9	ACC Payments: Did you make any payments to ACC? IF YES, please attach a copy of the invoices.	YES / NO	YES / NO
10	Donations, Childcare or Housekeeper Rebates: Would you like us to file a rebate claim on your behalf? IF YES, please provide the following: Receipts for donations made, details of childcare or housekeeper payments Bank Account Number you would like your rebate direct credited to: _____ (mandatory).	YES / NO	YES / NO
11	Share Trading: Did you buy or sell shares regularly during the year? IF YES, please provide details on separate sheet.	YES / NO	YES / NO
12	Investments/Term Deposits Have you made or disposed of any investments or term deposits this year? IF YES, please provide details on a separate sheet.	YES / NO	YES / NO
13	Investment Borrowing: Did you borrow money for your investments during the year? IF YES, please provide details on separate sheet.	YES / NO	YES / NO
14	Land/Property Transactions: Did you sell any land or property during the year? IF YES, please provide details on separate sheet.	YES / NO	YES / NO
15	Overseas Investments: Did you have any overseas investments during the year? IF YES, please provide details on separate sheet. Did the business have any overseas investments worth more than \$50,000 NZ during the year? IF YES, please provide full details including copies of investment statements, income statements, prospectuses and other correspondence.	YES / NO YES / NO	YES / NO YES / NO
16	Financial Arrangements: Are you an individual investor with investments GREATER THAN \$1,000,000 or investment income greater than \$100,000? IF YES, please provide details on a separate sheet.	YES / NO	YES / NO

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17	<p>Home Office / Workshop: Did you use any part of your home or garage to store business related tools, vehicles, financial records or to prepare your books/run your office? IF YES, please complete the following Circle who's return this relates to: · Total size of house + shed + garage in m2 · Area used as office in m2 · Area used as storage/workshop in m2 Home Expenses List any property expenses which have NOT been paid for by the business · Interest on Mortgage · Insurance – Dwelling · Insurance – Contents · Power / Gas · Rates and Water Rates · Rent · Repairs and Maintenance · Business Toll Calls · Telephone Line Charges · Internet Cost · Other (please specify)</p>	Yes Self _____ m 2 _____ m 2 _____ m 2	No Partner
18	<p>Student Loan: Did you have a student loan during the year? IF YES, please provide the following: Student loan statements from IRD On the Statements mark any payments voluntary or otherwise Advise the opening balance.</p>	YES / NO	YES / NO
19	<p>Family Support Received: Did you receive child support or Family Support during the year or do you have children under 18 years of age or who turned 18 years of age during the year? IF YES, please provide details on Form E.</p>	YES / NO	YES / NO
20	<p>Partners Income: If we do not prepare your partner's return and you wish to file for family support, please advise the following: Partners Name: _____ Partner's IRD Number: _____ Partner's Income: \$ _____</p>		
21	<p>Child Support: Did you pay child support during the year? IF YES, please provide amount paid.</p>	YES / NO \$ _____	YES / NO \$ _____

THANK YOU FOR COMPLETING THIS CHECKLIST!