



Individual Questionnaire – 31 March 2021

Ensure this questionnaire is completed and included with your records.

Client Name:		Balance Date:	
Email:		Phone:	

To: Sutcliffe Graham & Co Limited

Terms of Engagement

I hereby instruct you to prepare my Taxation Returns for the 2021 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 to complete the above assignments. I authorise you to obtain information from Inland Revenue about all tax types except child support (NCP or CPR) to complete the above assignments. This includes obtaining information through all Inland Revenue media and communication channels, including electronic channels.

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

I also accept that you have the right to charge interest on overdue accounts at the rate of 2.5% 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 your discretion. I accept that any collection costs you incur will be fully recoverable from me.

Signature _____ Date _____

Have your contact details changed in the past 12 months? If yes, please provide details: _____ _____
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Records Required	Comments
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/Salary 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.	
Student Loan	
Do you have a student loan?	
Interest and Dividends	
Please supply the following documents- <ul style="list-style-type: none"> For interest received, your bank should send you an annual resident withholding tax (RWT) certificate showing the interest earned and withholding tax deducted during the year. For dividends received, please provide each dividend tax notice. If any dividends are taken as bonus shares, also include these statements. 	

Records Required		Comments
Rental and Leased Property		
If you earned rental income or leased a property during the year, please also complete the rental questionnaire		
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.		
Overseas		
<ul style="list-style-type: none"> ▪ Supply details of overseas interest, dividends, rental income, wages received, and taxation paid. ▪ Provide details of any overseas investments held at any time during the financial year. ▪ Attach all your investments advisor's reports including managed portfolio 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? 		
Any Other Income		
Attach details: <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. 		
Donations		
Do you want us to complete your rebate claim form? Yes No If so, please attach your donation receipts.		
Residential Land Withholding Tax		
Have you sold residential property in New Zealand where Residential Land Withholding Tax has been deducted and paid to the IRD? If so, provide details e.g., IR1100 Residential land withholding tax return and other sale and purchase documents.		
Working for Families Tax Credits		
If you believe you are eligible to receive Working for Families Tax Credits, please complete the Family Details Questionnaire on the website.		

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