

PERSONAL INCOME TAX RETURN QUESTIONNAIRE 2019

YOUR NAME _____ / / (DOB)

YOUR SPOUSE _____ / / (DOB)

To: Paul Enoka Advisory Ltd

Acknowledgement of Terms of Engagement

You are instructed to prepare our 2019 Tax Returns. We accept responsibility for the accuracy and completeness of the information supplied. We also accept responsibility for supplying all information necessary to enable returns to be filed by due date. We acknowledge that the legal obligation to file tax returns and pay tax by due date rests with us.

We acknowledge that you will charge for your work based on time engaged and that invoices issued by you are payable within 14 days of receipt unless a special arrangement has been made in writing. Unpaid accounts may be charged a 2.5% account fee per calendar month. Full debt recovery costs (including legal fees) may be added to any unpaid debt should this arise. If you are a director or shareholder (owning at least 15% of the shares) of the Client you shall be personally liable for the performance of the Client's obligations.

You are to represent us as our agent for tax and ACC purposes for all associated entities. Authority is given to obtain information about all tax and ACC types. This includes obtaining information through all media and communication channels.

We acknowledge that the legal obligation to file tax returns and pay tax by due date rests with us.

Under the terms of the Privacy Act (1993), we authorise Paul Enoka to seek additional information as they may require to complete the above assignments.

Signature:..... **Date:**

Signature:..... **Date:**

(Please sign this form)

	Yes	No
1. Donations		
(a) Are you entitled to a claim for donations? Please attach all receipts.		

2. Specific Income	<u>YOU</u>	<u>YOUR SPOUSE</u>
Did you receive any of the following income?		
a) SALARIES/WAGES	YES/NO	YES/NO
b) NATIONAL SUPER	YES/NO	YES/NO
c) FAMILY ASSISTANCE	YES/NO	YES/NO
d) REDUNDANCY PAYMENT/RETIRING ALLOWANCE	YES/NO	YES/NO
(Attach all Certificates)		
i. Do they cover the full year?	YES/NO	YES/NO

<p>We will request a Statement of Earnings on your behalf from the Inland Revenue Department. This will have the details of your salary and wages earned for the year.</p>		
<p><u>INTEREST AND DIVIDENDS RECEIVED</u> (from both NZ and overseas) - Please provide advice slips. For interest you should have received an annual advice notice.</p>	<p>YES/NO</p>	<p>YES/NO</p>
<p><u>INCOME FROM OTHER SOURCES:</u></p> <p>- Estate or Trust</p> <p>- Other _____</p>	<p>YES/NO</p> <p>YES/NO</p>	<p>YES/NO</p> <p>YES/NO</p>

Yes No
<p>3. Other Income and Expenses</p> <p>Please supply details of income received and expenses paid</p> <p>1) Were you a non-resident during the income tax year?</p> <p>2) Did you receive income from overseas?</p> <p>3) Did you receive income or losses from a partnership? If “yes”, attach details of the income, e.g. financial statements, tax certificates etc.</p> <p>4) Did you or will you receive shareholder salaries from businesses for which Paul Enoka Chartered Accountants Ltd do not prepare the financial statements? If “yes”, provide supporting details, e.g. financial statements, or show who prepared the financial statements and tax returns for those businesses so we can determine the details.</p> <p>5) Did you receive income from rents? If “yes”, provide details. If appropriate, complete our “Annual Checklist – Investment Properties”.</p> <p>6) Did you have any other income (Trusts, Portfolio Investment Entity, Other)?</p> <p>7) Did you receive losses from a look through company (LTC) for which Paul Enoka do not prepare the financial statements? If “yes”, provide supporting details, e.g. financial statements, or show who prepared the financial statements and tax returns for those businesses so we can determine the details.</p> <p>8) Can you claim expenses e.g. income protection insurance? If “yes”, attach details of the claim, e.g. receipts or certificates.</p> <p style="margin-left: 40px;">Income Protection Insurance \$ _____ \$ _____</p> <p style="margin-left: 40px;">Interest paid on borrowed funds \$ _____</p> <p>9) Did you have an interest in a foreign company, unit trust, life insurance policy or superannuation fund?</p> <p>10) Have you purchased /sold any shares during the year? If “yes”, provide details</p>

4. OVERSEAS INVESTMENTS

Please provide us a list of all shares held in companies.

Company	Country	Number held	Value per Share
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5. FAMILY DETAILS

Please complete as you may be entitled to Working for Families and Parental Tax Credits.

Have your circumstances changed during the year (eg shared custody, change in marital or relationship status)?

Change _____ Date _____

Please supply full names and birth dates of all children. Please note the following:

- If you had a child born within the current financial year you may be eligible for the Parental Tax Credit. Please include their IRD Number below. If you do not have this you will need to obtain one for them in order to claim any entitlement for them.
- Where a child has become financially independent during the current financial year, please advise the date they left school or home.
- Also provide details of any child support or maintenance payments made or received.

<u>Child's Name</u>	<u>IRD No.</u>	<u>Date of Birth</u>	<u>Date left School</u>
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Thank you for completing this questionnaire

Don't forget to sign it