

CLIENT INTERVIEW AND INFORMATION QUESTIONNAIRE - 2011 PERSONAL INCOME

NAME:.....

PLEASE HELP US KEEP OUR DATABASE UP TO DATE (note any changes here)

Postal Address:.....**Street Address:**.....

Home Address:.....**Email Address:**.....

Contact Names: 1..... **2**.....

**ENCL
TICK HERE**

1. INCOME: Please provide the following:

a) Certificate of Earnings

We will obtain this information from the IRD directly.
Please supply details of Family Support payments received.

b) Interest and Dividends

An Interest Withholding Tax Deduction Certificate (IR15) will be sent to you by your bank, or other financial institutions. We require these for joint accounts also.
A dividend payment advice will accompany dividend cheques indicating withholding tax deductions or imputations credits.
Income from Portfolio Investment Entities (PIE)

Overseas Investments - details of all foreign investments and income. Note that the income tax law has changed so we require all purchase and sale documentation for overseas investments as well.

c) Other Income and Expenses

Rents Received (Gross Rents and Expenses)
Income from Partnerships/Trusts/Estates (not prepared by us)
Expenses to obtain self-employed income e.g. real estate agents
Any other income.

2. REBATES: - These reduce your tax liability

a) Low Income (less than \$9,880)

Did you work more than 20 hours per week? If so, for how many weeks?

b) Donations

Attach all receipts for **donations** to schools, churches, charitable organisations. Minimum donation is \$5.

c) Housekeeper/Childcare

Name of Housekeeper/Childcare provider
Receipts Total \$.....

d) Tax Credits For Working Families (Formerly Family Assistance)

- You may be entitled to this rebate which is dependent on joint family income, number of children and number of hours worked.
- Attach names of children, birth dates and other changes in your family during the year.
- Did you and your spouse work more than 30 hours per week between you during the year?
Yes/ No If so, for how many weeks of the year? weeks

3. Student Loans

Do you have a student loan? If so, please supply details.

4. Child Support

Did you receive/pay any Child Support during the year? If so, please supply details.

5. Income Protection Insurance

Please provide details.

CLIENT SIGNATURE:..... **DATE:**.....