

# Individual Questionnaire – 2011

Please ensure this questionnaire is completed and included with your records

Client Name		Phone:	
Balance Date		Fax:	
		Email:	

To: CST Nexia Ltd

## Terms of Engagement

We hereby instruct you to prepare our Taxation Returns for the 2011 year. We 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, all government agencies and any other necessary parties to obtain such information as you require in order to carry out the above assignments.

You are also requested to represent us as our tax agent for all tax types.

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

<b>Records Required</b>	<input checked="" type="checkbox"/>	<b>Comments</b>
<b>Wages/National Superannuation/Benefits</b>		
If available, please provide us with the details (including payer name) of payments received from any of the following; <ul style="list-style-type: none"> <li>▪ Wages</li> <li>▪ ACC Payments</li> <li>▪ National Superannuation</li> <li>▪ Any other benefits</li> </ul> In most cases IRD will have sent us these details direct, however we do need to check all details have been included.	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	
<b>Investments, Interest and Dividends (including Mercury Energy)</b>		
Please supply the advice slips relating to any investment income received. <ul style="list-style-type: none"> <li>▪ For interest received, you should have an annual advice notice showing the withholding tax deducted. This may also be on the bottom of your Bank Statement dated 31 March.</li> <li>▪ If any dividends are taken as bonus shares, also include these advice slips.</li> <li>▪ If you have a managed portfolio, please provide the name and contact details of your portfolio manager, plus any reports provided by them for the 2011 year.</li> <li>▪ Bank or loan accounts denominated in a foreign currency.</li> </ul>	<input type="checkbox"/> <input type="checkbox"/>	
<b>Rental and Leased Property</b>		
Please complete attached rental questionnaire or contact us if you require one and it has not been included.		
<b>Home Office Expenses</b>		
If part of your home is set aside principally for use as an office/workshop/storage area in relation to your taxable income, please provide the following details:		
Power \$ _____ Insurance (Building & Contents) \$ _____ Interest (House Mortgage) \$ _____ Rates \$ _____ Repairs & Maintenance \$ _____ Other \$ _____ <b>Total</b> \$ _____	Cost of House and Section \$ _____ Cost of Section \$ _____ Business Area _____ M2 Total Area _____ M2	



<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.  
Please don't forget to sign it on the front page.**