## BALANCED ACCOUNTING TARANAKI LTD PO Box 391, Taranaki Mail Centre, New Plymouth 4340

## CLIENT QUESTIONNAIRE 2021 INCOME TAX YEAR

admin@batltd.co.nz 06 927-3173

For Salary and Wage Earners and/or Income derived from Interest, Dividends or Rents.  Client:								
	Address:							
				Mobile No:				
		Post cod	le:	Phone	e No:			
	Email:							
	assist us in the completion estions:	of your perso	onal taxatio	n return would you ple	ase answer th	e following		
a)	Income							
	Did you receive any of the following - if so, attach details							
	Salary or Wages Accident Compensation Earnings Unemployment or other income tested benefits Interest - Summarise Details on page 3 Dividends - Summarise details on page 3 Family Support Payments from Social Welfare Schedular Payments (formerly Withholding Pymts) Overseas Pensions	GROSS 1		National Super Other NZ Pensions Annuities & Super Rents - Summarise details on page 3 Income from Estate/ Trust/Partnership Income from Sale of Land/Business Income from Sale of Shares  Any other income Foreign Super	GROSS			
I a ad red	ERMS OF ENGAGEMENT authorise you to prepare finant vise you not to complete an autords and information supplie	udit or review. d to you.	I accept res	oonsibility for the accura	cy and complet	teness of all		
ра	cknowledge that you will char yable by the 20 <sup>th</sup> of the month writing.							
pu ac giv	Iso give you my full authority to rposes of obtaining information knowledge that this information my full authority for this state ormation from the Bank, IRD,	on necessary on would not c tement to be u	to complete therwise be sed as writte	my return of income at available due to the Pri en confirmation of my ag	nd financial sta ivacy Act restri greement to you	atements. I ctions, but I		
 PI	LEASE SIGN HERE			Date				

b)								
Charitable donations or school fee Donation (attach receipts - over \$5)								
	Please advise the Bank Account name	e the Bank Account name and number for rebates to be banked into;						
	Name	 Bank						
c)	Working for Families Details  Names of Children	<u>Date o</u>	f Birth	IRD Number				
As	from 1 April 2011 there have been s	significant cha	inges to the types of inc	come that need to be				
inc	luded in calculating your Working for  will need details of the following if ap	Families Tax						
-Attributable Trustee Income (Settlors) -Attributable fringe benefits (Shareholder Employees) -PIE Income -Passive Income of Children (Over \$500/child) -Income of non-resident spouse -Tax exempt Salary or Wages -Pensions and Annuities -Other payments over \$5,000 used for day to day living expenses -Income equalisation scheme Deposits (excludes "adverse events" deposits)								
•	ou have any questions about any of ternatively you can visit www.ird.govt.r	•	0,					
d)	Are you a trustee of an Overseas	Trust or Esta	ate? Yes/ No					
lf s	o please provide details of the Trust.							

## Interest Received or Credited during the 2021 year

Name of Payer		<b>Gross Interest</b>			Withholding Tax			
Dividends Received during the 2021 year								
Name of Company	me of Company Gross Divid		Withholding Tax	<b>T</b>	Imputation Credits			
Rental Income Received								
Property Address:								
Rental Received (Period to								
<u>Expenditure</u>								
Rates \$								
Insurance (Dwelling) \$								
Repairs & Maintenance (attach Details) \$  Interest on Mortgage \$								
Other - Please Specify	\$							
	\$		•					