



INDIVIDUAL CLIENT INFORMATION

(Please complete as fully as possible to save you time & cost)

Name: «surname», «firstname»

Date:
FY: 31 March 2010

Address: Postal: «mail_addr1», «mail_addr2», «mail_addr3», «mail_addr4», «mail_ctry»

Tel: Bus: «tel_bus»
 Mob: «tel_mob»
 Email: «email»

Home: «tel_home»
 Fax: «tel_fax»
 IRD No: «tax_no»

Occupation:

Date of Birth: «birthday»

INFORMATION REQUIRED For Period 1 April 2009 to 31 March 2010

(For you as an individual taxpayer only)

	<u>Yes/Supplied / N/A</u>	
Records		
1. Did you receive income from salary or wages? Yes / No (We will get the figures direct from IRD if you answered yes) Please include documents for all of the following:	<input type="checkbox"/>	<input type="checkbox"/>
2. All Investment Dividend Statements attached	<input type="checkbox"/>	<input type="checkbox"/>
3. All Interest RWT Statements attached (banks, finance co's etc.)	<input type="checkbox"/>	<input type="checkbox"/>
4. Receipts for Donations/School Fees etc (Please Attach Receipts) (If you require us to file Personal Tax Rebate Claim)	<input type="checkbox"/>	<input type="checkbox"/>

Other Information Required

5. **Any other Income or Distributions (attach details)**
 (Estates/Trusts/P/Ships/Any O'Seas Income/Shareholders Salaries, LAQC Losses)

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PIE Income: (Kiwisaver etc) Do you have PIE Investments
If, YES

What is your current year (31 March 2010) PIE PIR Rate: **Circle:** 19.5% or 30%
 What is to be your 2011 financial year rate: 12.5% or 21% or 30%

6. **Investments**
 (Detail Investments purchased or sold throughout the FY. Attach all contracts relating to these transactions)

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7. **General Information**

Any Self Employed ACC Levies Paid? \$.....

8. Do you own **Rental Property(s)**? (If yes please complete rental questionnaire).

9. Any **subdivision** activity on your own property?

10. **Other Relevant Information & Details**

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11. **Bank A/C Details** (all taxpayers should supply a bank A/C for any refunds and donations rebates to be direct credited to)

A/C Number A/C Name:

Better still please enclose a "bank encoded" deposit slip

12. **Income Protection Insurance**

Details of any Income Protection Insurance premiums paid for the year (do not include Accident & Sickness or Southern Cross medical premiums). \$.....

Terms of Engagement (we need this signed to enable us to act as your agent under the Privacy Act)

«name» authorises B.J. King & Associates Ltd to act as our Agent for all Tax Revenues and ACC Accounts and to prepare, sign and file returns on our behalf. I/we authorise B.J. King & Associates Ltd to contact IRD, our banks, solicitors and any other professional agencies to obtain any relevant information, either verbally, written or online, to complete our accounts and returns. We accept responsibility for the accuracy & completeness of the information supplied which is used in the preparation of our financial statements and/or tax returns. B.J. King & Associates Ltd are not required to complete an audit and we accept therefore that their work cannot be relied upon to detect error or fraud. We further understand that the financial statements will be prepared at our request and for our purposes only and that B.J. King & Associates Ltd will not be liable for any losses, claims or demands by any third person.

We further acknowledge that payment for fees rendered in relation to the work undertaken will be made on completion and at the time of receiving the completed information and invoice. Fees remaining unpaid and outside the terms as agreed will incur interest at the rate of 1.5% per month on the outstanding amount until paid.

Any costs incurred in recovering fees invoiced will be recoverable from us.

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Client Signature

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Date