

QUESTIONNAIRE - INDIVIDUAL

Ensure this checklist is completed and included with your records, and please don't forget to sign on the back.

TAX YEAR ENDED: 31st MARCH 2020
1st April 2019 to 31st March 2020

Name	Address
Phone	Email
IRD number	Bank account number for your all tax refunds:

We require you to sign your tax return before it is finalised with IRD. Please tick one of the following options:

Sign at a meeting at BJ King office	<input type="checkbox"/>
Have them posted to me	<input type="checkbox"/>
Please email all the returns to me	<input type="checkbox"/>

INFORMATION REQUIRED During this financial year –

		Yes	N/A
1	Did you receive income from salary or wages? If so we can obtain this information from IRD's website	<input type="checkbox"/>	<input type="checkbox"/>
2	Did you receive any New Zealand or Overseas Dividend income? If so please provide copies of the dividend statements	<input type="checkbox"/>	<input type="checkbox"/>
3	Did you receive any bank interest? If so please send us copies of any certificates you receive.	<input type="checkbox"/>	<input type="checkbox"/>
4	Did you receive any other income or distributions? If so please provide a copy of the end of year information Such as from: - Estates	<input type="checkbox"/>	<input type="checkbox"/>

	<ul style="list-style-type: none"> - Trusts - Partnerships - Overseas income - Shareholder salaries - LTC losses/profit apportionments - Overseas pension lump sum withdrawals 		
5	Did you pay any donations in the year? If so please provide receipts		
6	Did you buy and /or sell any investments in the year? If so please provide copies		
7	Do you have any PIE investment (including KiwiSaver)? If so please send a copy of your end of year tax statement		
8	Do you own a Rental Property? If so please complete the rental questionnaire and send copies of supporting documentation		
9	Did you sell or subdivide land or property in the year? If so please provide details		
10	Did you pay an Income Protection Insurance premiums? If so please send a copy of the end of year insurer letter Please do not include agreed value policies or sickness policies		
11	Are you eligible for Working for Families Tax Credits? Would you like us to prepare the end of year WFTC calculation? If so please complete our WFTC worksheet		

Other relevant information & details

INSTRUCTIONS & AUTHORISATIONS

I instruct B J King & Associates Ltd to prepare my tax return for the 2020 financial year. I undertake to supply all information necessary for this engagement and to be responsible for the accuracy and completeness of such information. Your services are not intended to, and accordingly will not result in the expression by you of an opinion on the financial statements or tax return insofar as third parties are concerned.

Authorisation to obtain information subject to the Privacy Act

I authorise B J King & Associates Ltd to communicate with the appropriate bankers, solicitors, finance companies, all government agencies and other persons or organisations to obtain such further information as is required to carry out the above engagement. This authorisation will stay in place until cancelled by either party in writing.

Authorisation for Inland Revenue Department

I hereby authorise B J King & Associates Ltd to act as our agent for all tax and revenue types in accordance with section 81 (4)(1) of the Tax Administration Act 1994 and to sign and file prepared returns on my behalf.

Authorisation for Accident Compensation Corporation

I authorise B J King & Associates Ltd to act as my agent for ACC levy purposes for all associated entities. This authorisation allows B J King & Associates Ltd to query and change information on my ACC levy account(s) through ACC staff, and through ACC Online Services. This authority will also allow B J King & Associates Ltd main representative discretion to delegate access to my ACC information to other members of B J King & Associates Ltd. Other delegated members of B J King & Associates Ltd will also be able to query and change information on my ACC levy account

Name: _____

Signature: _____ **Date:** _____

