Chatfield & Co Limited

CHARTERED ACCOUNTANTS

2011 Individual Client Information Sheet
(For your personal Tax Return)
Tax Residents of New Zealand are required to include their World Wide Income

	(Client Name)
	Birth Date ____/____/
IRD No - -	Phone

Spouse Details (if separate sheet not attached for spouse)
Full Name
Date of Birth ______/______/19_____ IRD No - -

Terms Of Engagement

I accept responsibility for the accuracy and completeness of the information supplied herein which is to be used in the preparation of my Income Tax Return. Chatfield & Co Limited is not to complete an audit, nor do I wish you to undertake a detailed review of my affairs in order to substantiate the accuracy of my Financial Accounts.

I understand your work may not necessarily detect error or fraud and that you accept no liability for the accuracy and completeness of the information supplied by me.

I further understand that the Income Tax Return will be prepared at my request and for my purposes only and that you will not be liable for any losses, claims or demands by any third person.

I also accept responsibility for all other records and information supplied to you other than those listed herein. I accept responsibility for any failure by me to supply all relevant records and information to you.

The information contained herein is correct according to the best of my knowledge and belief.

I agree to personally indemnify Chatfield & Co Limited for fees outstanding. I agree that Chatfield & Co Limited shall be entitled to exercise a general lien over all the books, records, related documents and other such chattels that may come into the possession of Chatfield & Co Limited for the purpose of performing professional services for me until all costs and charges whatsoever of Chatfield & Co Limited for professional services of any nature to me have been fully paid.

I also give Chatfield & Co Limited my full authority to obtain information from my Bank, my lawyer, my Financial Advisor, WINZ and the Inland Revenue Department for any purposes relating to my affairs. Without limiting the above this authority also applies for the obtaining of information from the Inland Revenue Department about all tax types. I acknowledge that this information would not otherwise be available due to the Privacy Act restrictions, but I give my full authority for this statement to be used as written confirmation of my agreement to your obtaining information from the Bank, lawyer and IRD for the above mentioned purposes.

Signature:

Date: ____/____/

Interest And Dividends

Provide full details of source, and amount received. Dividend, interest, and bonus issue advice slips are required to show interest withholding tax paid on your behalf and imputation tax credits available to you.

Please note we also require dividend and interest advice slips for joint investments.

Total number of Certificates attached ☐

I have not received any interest or dividends ☐

I list below any interest or dividends I received for which I don't have a certificate:

Residency

Have you ever lived outside New Zealand? YES / NO

If YES, how long have you live outside New Zealand? ________

And when did you arrive in New Zealand and become a NZ resident? ________

If you believe you are not a NZ resident for tax purposes, please write a note to us to explain why.

Transitional resident rules may apply in your favour if you arrived here after 31 March 2006. Investment in Life Insurance policies, superannuation schemes, accrued superannuation entitlement, annuities and pensions can be subject to tax but may be exempt. You need to give us details if you have any of these.

Government and SOE stock and other Tradeable Stocks excluding Shares

The buying or selling of such stocks can lead to taxation being due on the difference between the sale price of the stock and the original purchase price. Please list on a separate sheet of paper any such stocks or notes held by you during the year along with the following information for each of the stocks currently held and those sold in the financial year:

⇒ Date Purchased	Date Sold
⇒ Price Paid	Price Received
⇒ Accrued Interest	Accrued Interest
⇒ Costs	Costs

I have no such investments ☐

Other Income

Where applicable please attach a separate schedule:

◊ Rents	None ☐	Attached ☐
◊ Partnership, Trust on Estates	None ☐	Attached ☐
◊ Overseas Income	None ☐	Attached ☐
◊ Other	None ☐	Attached ☐

Overseas Investment Details Required

The Inland Revenue Department requires full details of all foreign investments held in other countries including details of the type of investment and country held. These investments include Shares in Companies held, Unit Trusts, Life insurance endowment policies and superannuation investments

A schedule of these is attached ☐
I have no such investments ☐

Student Loans

This Section is not Applicable ☐

Do you have a student loan?	Yes ☐	No ☐
Have you made any repayments other than those listed on your Earnings certificate ?	Yes ☐	No ☐
Was your income more than $19,084	Yes ☐	No ☐

If you answered yes to the above please forward an SL9 (Student Loan Repayment Calculation) with your tax return. If your assessable income is less than $19,084 you must still complete a tax return. Please complete the SL9 and forward with Inland Revenue Statement of Account.

2012 Provisional Tax

2012 Provisional Tax is payable during this tax year for the following year by those who are self employed and have a Residual Income Tax of $2,500 or more. Generally it is based on the previous year's income level. If you recently became self-employed, or anticipate becoming self-employed during the year, or you anticipate a significant change in the level of income over last year you may wish to estimate your liability for 2012 Provisional Tax. These taxes are generally due on 28 August 2011, 15 January 2012, 7 May 2012.

I am registered for GST on a six monthly basis ☐
I am registered for GST and wish to pay my provisional taxes with my GST returns ☐
I do not wish to estimate my 2012 Provisional Taxes at this time ☐
Please contact me as I would like to discuss estimating my 2012 Provisional Tax ☐

Other Tax Credit Information

Was your total income less than $9,880? Yes ☐ No ☐

If ***yes,*** were you a full time wage/salary earner during the year
(ie 20 hours/week single parent or 30 hours/week for joint spouses) ? Yes ☐ No ☐

If ***yes***, please state how many weeks of the year

Independent Earner Tax Credit
If your income was between $24,000 and $44,000, how many weeks did you work?

Did you receive overseas private pension?

Have you supplied full details of your spouse's income? Yes ☐ No ☐
If ***no***, please advise accordingly.

Special Home Farm Ownership Accounts

IR30 from your savings institution is attached ☐
Not Applicable ☐

Working for Families

This Section is not Applicable ☐

Detail names and birth dates of all children for whom you or your spouse received working for families credits during the year. If your child left school during the year please advise the date of leaving.

Name of Child	Date of Birth	Date Left School
________________	/ /	/ /
________________	/ /	/ /
________________	/ /	/ /
________________	/ /	/ /

Have you married, separated or otherwise changed your family circumstances during the year to 31 March 2011?

Yes ☐ No ☐

If ***yes,*** please state clearly the change of circumstances:

Have you received/paid maintenance from/to any person during the year? Yes ☐ No ☐
If ***yes***, please state -
From/To whom ________________________________ Amount Received/Paid $

Income Protection Insurance
Have you paid income protection insurance during the year? Yes ☐ No ☐ If ***yes,*** please provide the name of the insurance company and the amount paid.

Family Trusts
Do you have a Family Trust? Yes ☐ No ☐ If ***yes,*** please completed the attached questionnaire and list the names of the Trusts below.
Please contact me as I would like to discuss setting up a Trust ☐

Date Received & Initials Of Reviewer: ____/____/