

Annual Questionnaire – Schedular Contractors

For the financial year.....

CLIENT NAME:

The following lists contain all the relevant information that will allow us to use your information to finalise your business accounts. Please supply copies of all information for your expenses claims. If you have withholding tax deducted as schedular payments, we can obtain \$ details from IRD.

Type of business activity

Number of hours worked per week (on average)

Are you GST registered? YES / NO (if yes, supply copies of returns & supporting papers)

Has any withholding tax been deducted from your business income? YES / NO

Do you use a business bank account? YES / NO

If yes, Statements & cheque butts / deposit books please.

Do you record business transactions on a cashbook spreadsheet? YES / NO

INCOME RECEIVED

Total income in - if bank statements are not available, supply copies of invoices

EXPENSES CLAIMS – please tick any applicable types & provide receipts

Tools & Equipment

Courses & Training

Professional fees

Business insurance policies Detail Types of policies?

Business Travel National / International

dates & purpose, itinerary.....

Home Office (please provide either total costs here, or copies of the bills)

- Total area of house
- Area of office
- Mortgage interest
- Rent
- Rates
- Power
- Insurances
- Repairs & Maintenance

Telephone	-	Landline 50% line rental	_____
	-	Internet costs	_____
	-	Mobile	_____

Motor Vehicle running expenses

Business Percentage to be claimed per your logbook _____
 % claim for actual running costs - supply Receipts and logbook please
 (in the absence of a logbook you are limited to a 25% claim)

Vehicle/(s) used _____

OR: Per Kilometre claim for business purposes supply Logbook Km_____

Business Bank account fees / interest

Accounting / Legal expenses - supply details

Any other business costs _____
(please specify type and provide receipts)

Assets:

Please provide full details of any assets bought or sold for your business this year:

Date	Description of Asset	Cost / Proceeds	New/2 nd Hand	%Business Use

Please also complete a separate Individual Tax Questionnaire for your tax return information.

Terms of Engagement

I/We accept responsibility for the accuracy and completeness of the information supplied which is to be used in the preparation of our financial statements. We also accept responsibility for any failure on our part to supply all relevant records and information and we understand that the financial statements will be prepared at our request and for our purposes only. You will not complete an audit, nor undertake a detailed review of our affairs to substantiate the accuracy of this information and you will not be liable for any losses, claims or demands by any third person.

We authorise Diane Myers CA Ltd to communicate with our Bankers, Solicitors and Finance Companies to obtain such information as may be required in order to carry out the above assignment.

SIGNED:

Date: / /

Contacts

Phone Mobile Email

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