

Client Questionnaire for Individuals

Please take the time to complete this Questionnaire as it is a very important part of the accounting process. It helps you:

- Identify and provide the information we need to prepare your financial accounts.
- Minimise the queries from us during the preparation of your financial accounts.

Please complete the Authorisation below to enable us to complete your Financial Statements and Tax Returns

Authorisation

I/We authorise Winstone France Limited to complete the compilation of financial statements and other related tax returns for me/us for the 2023 financial year as per the existing terms of engagement. I/We understand that a compilation is limited to the collection, classification and summarisation of financial information supplied by me/us and does not involve the verification of that information. I/We do not require Winstone France Limited to carry out an audit or review assignment on the financial statements produced.

Pursuant to the Privacy Act 1993 I/we authorise Winstone France Limited to obtain whatever information is required from third parties to complete the preparation of my/our financial statements and tax returns and to obtain information from the Inland Revenue from time to time regarding my tax affairs on all tax types.

Client Signature (required)

Date

Update of Personal Details

IRD # _____

Full Name _____

Postal Address _____

Home Address _____

Email Address _____

Home Phone _____

Fax _____

Work Phone _____

Mobile _____

1 Income

Did you receive any income from paid wages/ superannuation/ withholding tax?
If YES, the IRD will provide us with a summary of your earnings

YES/NO

2 Interest/Dividends/Investments

Did you receive any income from Interest, Dividends or Portfolio Investment Entities (PIE) or Foreign Investment Funds (FIF)?
If YES, please provide all statements, certificates, advices and or full advisor reports

YES/NO

Did you sell any shares during the year?

YES/NO

3 Rental Property Income

Did you receive income from Rents?
If YES, please complete the following:

YES/NO

Address of Property _____

Number of weeks the Property was rented during the year _____

Rent Received	\$ _____	provide any statements from rental agencies
Interest on Mortgage	\$ _____	
Insurance	\$ _____	
Rates	\$ _____	
Repairs & Maintenance	\$ _____	please include invoices
Assets Purchased	\$ _____	please include invoices

If you have purchased or sold the property during the 2023 financial year please provide the purchase/sale agreement and the solicitors settlement statement.
If you have more than one property please provide the above information for each property on a separate sheet.

4 Other Income

Did you receive any income from Partnerships, Trusts, Estates, Overseas Pensions, LAQC Losses?
If YES, please provide details

YES/NO

5 Income Protection

Did you pay for any Income Protection Insurance?
If already claimed in your business expenses indicate NO
If YES, please provide details or annual invoice.

YES/NO

6 Interest Paid

Did you pay interest on money borrowed to purchase shares or an interest in a business?
If YES, please provide loan details or statements.

YES/NO

7 Student Loan

Did you have a student loan?

YES/NO

8 Working for Families Tax Credits

If you think you are eligible for Working for Families Tax Credits please complete the following:

Name of Child	IRD #	Date of Birth	Date left School
_____	_____	____/____/____	____/____/____
_____	_____	____/____/____	____/____/____
_____	_____	____/____/____	____/____/____
_____	_____	____/____/____	____/____/____

	Principal Carer	Partner
The number of weeks worked during the year	_____	_____
The average number of hours worked per week	_____	_____

Have you married, separated or otherwise changed your family circumstances during the past year? YES/NO
If YES, please provide details.

If we do not prepare the tax return for your partner please provide details of their income. \$ _____

Will any family member be attending university or polytechnic next year? YES/NO

Please make sure you read the Notice of Entitlement letter you would have received from the Inland Revenue as it details what is included as Family Income.

Please advise of any other Income to be treated as Family Income. \$ _____

9 Donations

Did you make any Donations to registered Charity Church or School during the year? YES/NO
If YES, please provide all receipts

10 Bank Account

Do you want your refund (if applicable) to be direct credited to your Bank YES/NO
if YES, supply full account number including Bank, Branch, Account and Suffix

Bank account _____
Name of Account _____

11 Covid-19 Pandemic

Did you receive any Government Support as a result of the Covid-19 Pandemic including Wage Subsidies, Resurgence Support etc? YES/NO
If YES, please provide details