

# 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 2024 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

\_\_\_\_\_

<b>1</b>	<b>Income</b>	
	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
<b>2</b>	<b>Interest/Dividends/Investments</b>	
	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
<b>3</b>	<b>Rental Property Income</b>	
	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 2024 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.	
<b>4</b>	<b>Other Income</b>	
	Did you receive any income from Partnerships, Trusts, Estates, Overseas Pensions, LAQC Losses? If YES, please provide details	YES/NO
<b>5</b>	<b>Income Protection</b>	
	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
<b>6</b>	<b>Interest Paid</b>	
	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
_____	_____	____/____/____	____/____/____
_____	_____	____/____/____	____/____/____
_____	_____	____/____/____	____/____/____
_____	_____	____/____/____	____/____/____

The number of weeks worked during the year

The average number of hours worked per week

Principal Carer

Partner

Have you married, separated or otherwise changed your family circumstances during the past year?

If YES, please provide details.

YES/NO

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?

If YES, please provide all receipts

YES/NO

## 10 Bank Account

Do you want your refund (if applicable) to be direct credited to your Bank

if YES, supply full account number including Bank, Branch, Account and Suffix

YES/NO

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?

If YES, please provide details

YES/NO