ANNUAL QUESTIONNAIRE INDIVIDUAL 2023



Balance Date//.2023
Telephone Number Cell phone Number
Email
Physical Address
Engagement of Professional Services Campbell & Co Chartered Accountants Limited agrees to provide the following professional services:
 Preparation of financial reports and tax returns based on information provided to us in accordance with SES-2. Our procedures do not include verification of financial information. No audit or review engagement is undertaken. We will report on any matters that come to our attention in the process of undertaking your work. We will provide any other services as are agreed upon between us from time to time. Full terms and conditions are available on our website
You agree and confirm:
 You will supply all information necessary to carry out such services and will be responsible for the accuracy and completeness of such information. We may obtain any further information necessary for the completion of your engagement from any third party you had dealings wit during the year for the named above or other entities that you have interests in that affect the financial reports. This will normally be financial institutions and legal firms. To authorise Campbell & Co Chartered Accountants Limited to link to all tax types (except child support) at the Inland Revenue Department and to obtain information through all media and communication channels necessary to fulfil the agency responsibilities as our accountant and tax agent. We will not be liable for any penalties imposed by IRD as a result of incomplete records supplied to us. To authorise Campbell & Co Chartered Accountants Limited to access and change information through MyACC and directly with ACC staff. To authorise Campbell & Co Chartered Accountants Limited to transfer available tax payments/credits to offset related party tax liabilities.
Price and Payment Our fees are based on hours worked charged at rates appropriate to the work performed and the levels of expertise required, plus out of pocket expenses. If requested by you we will advise you of our estimated fee for the work to be undertaken. If our costs seem likely to exceed this figure, we will discuss the matter within a reasonable time frame. Our fees are payable by the 20th of the month following the invoice date. In the event that it is necessary to take action to recover overdue accounts, all collection costs incurred by us will be incurred by you.
Signature:
Full Name:
Date Completed:/

CAMPBELL & CO CHARTERED ACCOUNTANTS LIMITED PHONE: 03 974 9211

WEB: www.campbellca.co.nz
EMAIL: admin@campbellca.co.nz
P O Box 257, Kaiapoi 7644

IN	C	OI	ИE

Income	from	the	fol	lowina	sources	will h	e supp	lied	directly	to	us h	ov the	Inland	Revenue:

- Wages
- Salary
- NZ Superannuation Veterans Pension

- Taxable New Zealand Income Support Benefits
- **Accident Compensation Payments**
- Family Support
 Workplace Insurance

not been reimbursed). Please provide full details

Expenses incurred in earning withholding income can be claimed (where they have not been reimbursed). Please provide full details.									
OVERSEAS INCOME									
Did you receive any income from so	urces outside New Zealand durir	ng the year?		YES / NO					
Do you own shares in a foreign com	pany?			YES / NO					
Do you own units in a foreign unit tru	ust?			YES / NO					
Do you have a foreign life insurance	policy?			YES / NO					
Do you have an interest in a foreign superannuation scheme? YES / NO									
If you answered YES to any of the above, please attach details.									
INTEREST AND DIVIDENDS (New	Zealand and Overseas)								
Please supply us with all dividend an	nd interest certificates, including	joint investn	nents.						
Please provide full details of source and amount received. Dividend, interest and bonus certificates slips are required to show interest withholding tax paid on your behalf and imputation tax credits available to you.									
STUDENT LOAN									
Do you have a Student Loan?				YES / NO					
OTHER INCOME									
Please supply details of any cash	income								
Rents Received – please complete	e a separate Rental Questionn	aire							
Partnership, Trusts or Estates, Ov	verseas Income								
Partnership, Trusts or Estates, Ox If you have received income from a If the financial statements are not be	Partnership, Trust or Estate, plea								
If you have received income from a	Partnership, Trust or Estate, plea	advise us o	f the other Accountant	's contact details.					
If you have received income from a If the financial statements are not be	Partnership, Trust or Estate, plea eing prepared by us alternatively	advise us o	f the other Accountant	s contact details.					
If you have received income from a If the financial statements are not be Name of Entity:	Partnership, Trust or Estate, plea eing prepared by us alternatively	Tax Paid:	f the other Accountant	s contact details.					

EXPENSES

The only expenses you can claim are:

- A fee to someone completing your tax return.
- Commission on interest or dividend income (but not bank fees they are a private expense).
- Interest on money you borrowed to buy shares or to invest as long as the investment is expected to produce some taxable income.
- Premiums on loss of earnings insurance provided any pay-outs from the insurance policy are taxable income.

Are you able to claim for any expenses paid during the year?

YES / NO

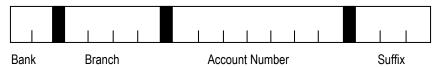
If yes, attach details.

TAX CREDITS FOR DONATIONS

Total amount of your Donations to Charities
 (Please staple your donation receipts to the back of this form)

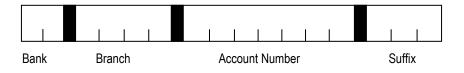


• Enter the bank account number you would like your rebate and any tax refund to be direct credited to: (The Inland Revenue may also transfer the rebate credit against any tax arrears you have.)



TAX REFUNDS

Enter the bank account number you would like your tax refund to be direct credited to:



WORKING FOR FAMILIES TAX CREDITS

If you believe you are entitled to Working for Families Tax Credits (WFFTC), please complete the back page.

WORKING FOR FAMILY TAX CREDITS (WF	FTC)							
Do you have children aged under 18 years or	Do you have children aged under 18 years or 18 years and attending secondary school or tertiary education? YES/NO							
If NO, you do not need to complete the rest of this page. If YES, please completer the following:								
Family Details; Name of Child	Date of Birth	IRD Number	<u>Date Left S</u>	chool				
	//		/					
			//					
			//					
There has been changes to the legislation to the As the changes affect your WFFTC claim, we need to be a second or the second of			income when applying	or receiving WFFTC.				
Have you received any income from any other	sources that we don	't administer?		YES/NO				
Other Trust Income Other Shareholder Income Interest or Dividends (including PIE Income) Fringe Benefits Passive income of your children Any payments used for day to day living expen	ses			YES/NO YES/NO YES/NO YES/NO YES/NO				
PARENTAL TAX CREDITS								
You may be entitled to a Parental Tax Credit if	you have had a new	child. If so your new chi	ld will require an IRD nu	mber.				
Have you had a baby during the previous year	?			YES/NO				
IF YES, have you applied for Parental Tax Credit? YES/NO								
WFFTC MONEY RECEIVED DURING THE YE	EAR							
Did you receive WFFTC during the year?				YES/NO				
If YES, How much did you receive?		\$						
FAMILY CHANGES								
Has there been any change in your marital sta	tus (this includes de	facto) during the previous	s year?	YES/NO				
Has there been a shared custody arrangement	:			YES/NO				
CHILD SUPPORT								
Did you pay child support to an ex-partner?				YES/NO				
If Yes, How much did you pay?		\$						
Was this arrangement through IRD or Private?	(Please circle)	IRD / Private						
Did you receive child support form an ex-partner	er?			YES/NO				
If YES, how much did you receive?		\$						
IN WORK PAYMENT You may be entitled to an In Work Payment de	pending on the week	kly hours worked						
In a single parent family you need to work more than 20 hours, for a two parent family you need to work more than 30 hours per week combined. Does your family meet these requirements? YES/NO								
If YES, provide number of hours worked.	Parent 1.		Parent 2.					
If your spouse files his/her own tax return, we v	will need a copy of th	is return to calculate the	total family income.					