

ANNUAL QUESTIONNAIRE
INVESTMENT 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 with 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

INCOME

Income from the following sources will be supplied directly to us by the Inland Revenue:

- Wages
- Salary
- NZ Superannuation
- Veterans Pension
- Taxable New Zealand Income Support Benefits
- Accident Compensation Payments
- Family Support
- Workplace Insurance

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 sources outside New Zealand during the year? YES / NO

Do you own shares in a foreign company? YES / NO

Do you own units in a foreign unit trust? 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 and interest certificates, including joint investments.

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 a separate Rental Questionnaire

Partnership, Trusts or Estates, Overseas Income

If you have received income from a Partnership, Trust or Estate, please supply details and advice notes received.
If the financial statements are **not** being prepared by us alternatively advise us of the other Accountant's contact details.

Name of Entity: _____

Gross Taxable Interest Income: \$ _____ Tax Paid: \$ _____

Gross Dividends: \$ _____ Tax Paid: \$ _____

Other Income: \$ _____ Tax Paid: \$ _____

