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.

P O Box 257, Kaiapoi 7644

Signature:	
Full Name:	
Date Completed:	//
	CAMPBELL & CO CHARTERED ACCOUNTANTS LIMITED PHONE: 03 974 9211 WEB: <u>www.campbellca.co.nz</u> EMAIL: admin@campbellca.co.nz

INCOME

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

- Wages
- Salary

Other Income:

- 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 sou	urces outside New Zealand du	ring the year?	YES / NO			
Do you own shares in a foreign comp	bany?		YES / NO			
Do you own units in a foreign unit tru	st?		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 2	Zealand and Overseas)					
Please supply us with all dividend an	d interest certificates, includin	g 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: \$				

\$_____

Tax Paid: \$_____

ENSES						
A fee to some Commission o Interest on mo Premiums on	one completing your to in interest or dividend oney you borrowed to loss of earnings insura	income (but not bank fees – they are a buy shares or to invest – as long as the ance provided any pay-outs from the in	ne investment is expected to produce some taxable income.			
If yes, attach details.						
CREDITS FO	R 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.) 						
Bank	Branch	Account Number	Suffix			
TAX REFU	NDS					
Enter the bank account number you would like your tax refund to be direct credited to:						
Bank	Branch	Account Number	Suffix			
	A fee to some Commission of Interest on mo Premiums on you able to clai s, attach detail CREDITS FO Total amount of (Please staj) Enter the bank (The Inland Ro Bank TAX REFU Enter the bank	only expenses you can claim are: A fee to someone completing your to Commission on interest or dividend Interest on money you borrowed to Premiums on loss of earnings insura- you able to claim for any expenses p s, attach details. CREDITS FOR DONATIONS Total amount of your Donations to C (Please staple your donation rece Enter the bank account number you (The Inland Revenue may also trans Line Inland Revenue may also trans TAX REFUNDS Enter the bank account number you Line Inland Line Indexed States CREDITS FOR DONATIONS	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 Interest on money you borrowed to buy shares or to invest – as long as th Premiums on loss of earnings insurance provided any pay-outs from the i you able to claim for any expenses paid during the year? s, attach details. 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 re (The Inland Revenue may also transfer the rebate credit against any tax at Example 1 Account Number TAX REFUNDS Enter the bank account number you would like your tax refund to be direct IDENTIFY ON SET UNDS			

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