# ANNUAL QUESTIONNAIRE INDIVIDUAL 2025



D. J. J. J. 2025
Balance Date//.2025
Telephone Number Cell phone Number
Email
Physical Address
Engagement of Professional Services Campbell & Co Chartered Accountants Limited agrees to provide the following professional services:
<ul> <li>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.</li> <li>We will report on any matters that come to our attention in the process of undertaking your work.</li> <li>We will provide any other services as are agreed upon between us from time to time.</li> <li>Full terms and conditions are available on our website</li> </ul>
You agree and confirm:
<ul> <li>You will supply all information necessary to carry out such services and will be responsible for the accuracy and completeness of such information.</li> <li>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.</li> <li>To authorise Campbell &amp; 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.</li> <li>To authorise Campbell &amp; Co Chartered Accountants Limited to access and change information through MyACC and directly with ACC staff.</li> <li>To authorise Campbell &amp; Co Chartered Accountants Limited to transfer available tax payments/credits to offset related party tax liabilities.</li> </ul>
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

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Income	from	the	fol	lowing	sources	will h	ne :	supplied	di	rectly	to	US	hν	the	Inland	Reve	nue:

- Wages Salary
- NZ Superannuation Veterans Pension

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

Expenses incurred in earning withh	olding income can be claimed (where they h	ave not been reimbursed).	Please provide full details.
OVERSEAS INCOME			
Did you receive any income from so	ources outside New Zealand during the year	?	YES / NO
Do you own shares in a foreign con	npany?		YES / NO
Do you own units in a foreign unit tr	rust?		YES / NO
Do you have a foreign life insurance	e policy?		YES / NO
Do you have an interest in a foreign	superannuation scheme?		YES / NO
If you answered YES to any of the a	above, please attach details.		
INTEREST AND DIVIDENDS (New	Zealand and Overseas)		
·	ind interest certificates, including joint investr	ments.	
Please provide full details of source	and amount received. Dividend, interest an and imputation tax credits available to you.		are required to show interest
withholding tax paid on your behalf	•		
STUDENT LOAN			
			YES / NO
STUDENT LOAN			YES / NO
STUDENT LOAN  Do you have a Student Loan?	n income		YES / NO
STUDENT LOAN  Do you have a Student Loan?  OTHER INCOME  Please supply details of any cash	n income te a separate Rental Questionnaire		YES / NO
STUDENT LOAN  Do you have a Student Loan?  OTHER INCOME  Please supply details of any cash	te a separate Rental Questionnaire		YES / NO
STUDENT LOAN  Do you have a Student Loan?  OTHER INCOME  Please supply details of any cash Rents Received – please complete  Partnership, Trusts or Estates, O  If you have received income from a	te a separate Rental Questionnaire		eceived.
STUDENT LOAN  Do you have a Student Loan?  OTHER INCOME  Please supply details of any cash Rents Received – please complete  Partnership, Trusts or Estates, O  If you have received income from a	te a separate Rental Questionnaire  verseas Income  Partnership, Trust or Estate, please supply of	of the other Accountant's o	eceived.
STUDENT LOAN  Do you have a Student Loan?  OTHER INCOME  Please supply details of any cash Rents Received – please complete Partnership, Trusts or Estates, O  If you have received income from a If the financial statements are not be	te a separate Rental Questionnaire  verseas Income  Partnership, Trust or Estate, please supply one ing prepared by us alternatively advise us of the control of the contro	of the other Accountant's o	eceived. contact details.
STUDENT LOAN  Do you have a Student Loan?  OTHER INCOME  Please supply details of any cash Rents Received – please complete  Partnership, Trusts or Estates, O  If you have received income from a If the financial statements are not b  Name of Entity:	te a separate Rental Questionnaire  verseas Income  Partnership, Trust or Estate, please supply of the prepared by us alternatively advise us of the prepared by the prepared	of the other Accountant's o	eceived. 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

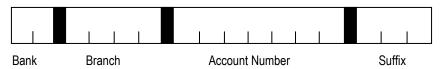
If yes, attach details.

### TAX CREDITS FOR DONATIONS

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

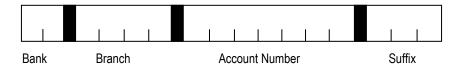


• Enter the bank account number you would like your rebate and any tax refund to be direct credited to: (The Inland Revenue may also transfer the rebate credit against any tax arrears you have.)



#### **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.

# SCHEDULE OF ACCOUNTS PAYABLE I have loaded Payables in my software Amounts owing by you at balance date. OR Total Incl GST Name of Creditor Description of Goods GST Net Amount Total SCHEDULE OF ACCOUNTS RECEIVABLE

amounts owed to you at balance date. OR I have loaded Receivables in my software								
Name of Creditor	Description of Goods	Net Amount	GST	Total Incl GST				
al		\$	\$	\$				

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 If YES, please completer the following:	this page.									
Family Details; Name of Child	Date of Birth	IRD Number	Date L	<u>_eft School</u>						
	//									
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			y income when app	lying or receiving WFFTC	<b>)</b> .					
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 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	ild will require an IR	D number.						
Have you had a baby during the previous year	?				YES/NO					
IF YES, have you applied for Parental Tax Cre	dit?				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 weel	kly hours worked								
In a single parent family you need to work more Does your family meet these requirements?	e than 20 hours, for a	a two parent family you n	eed to work more th		ombined. 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.							