

# **ANNUAL QUESTIONNAIRE**

## **INDIVIDUAL 2025**

**CAMPBELL & CO**  
CHARTERED ACCOUNTANTS

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:

- 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](http://www.campbellca.co.nz)  
EMAIL: [admin@campbellca.co.nz](mailto: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: \$ \_\_\_\_\_

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.

- 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

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

Bank

Branch

Account Number

## Suffix

## 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**Amounts owing by you at balance date.    **OR**    I have loaded Payables in my software

Name of Creditor	Description of Goods	Net Amount	GST	Total Incl GST
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
Total		\$	\$	\$

**WORKING FOR FAMILY TAX CREDITS (WFFTC)**

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 complete the following:

Family Details;

<u>Name of Child</u>	<u>Date of Birth</u>	<u>IRD Number</u>	<u>Date Left School</u>
.....	.../.../.....	.....-.....-.....	...../...../.....
.....	.../.../.....	.....-.....-.....	...../...../.....
.....	.../.../.....	.....-.....-.....	...../...../.....
.....	.../.../.....	.....-.....-.....	...../...../.....

There has been changes to the legislation to the types of income now included in your family income when applying or receiving WFFTC. As the changes affect your WFFTC claim, we require details of all family income.

Have you received any income from any other sources that we don't administer?

YES/NO

Other Trust Income

YES/NO

Other Shareholder Income

YES/NO

Interest or Dividends (including PIE Income)

YES/NO

Fringe Benefits

YES/NO

Passive income of your children

YES/NO

Any payments used for day to day living expenses

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 child will require an IRD number.

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 YEAR**

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 status (this includes de facto) during the previous 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 from an ex-partner?

YES/NO

If YES, how much did you receive?

\$.....

**IN WORK PAYMENT**

You may be entitled to an In Work Payment depending on the weekly 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 will need a copy of this return to calculate the total family income.