## ANNUAL QUESTIONNAIRE INVESTMENT 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>
<ul> <li>You agree and confirm:</li> <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: <a href="www.campbellca.co.nz">www.campbellca.co.nz</a>
EMAIL: <a href="mailto:admin@campbellca.co.nz">admin@campbellca.co.nz</a>
PO Box 257, Kaiapoi 7644 | PO Box 78 Rangiora 7440

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Income from	i the following	sources will be	supplied directi	lv to us h	v 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 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)		
Please supply us with all dividend a	and interest certificates, including joint investr	nents.	
	and amount received. Dividend, interest an and imputation tax credits available to you.	d bonus certificates slips a	are required to show interest
withholding tax paid on your behalf	•		
STUDENT LOAN	<u> </u>		
			YES / NO
STUDENT LOAN			YES / NO
STUDENT LOAN  Do you have a Student Loan?			YES / NO
STUDENT LOAN  Do you have a Student Loan?  OTHER INCOME  Please supply details of any cash			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 Rents Received – please complete  Partnership, Trusts or Estates, O  If you have received income from a	n income 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	n income te a separate Rental Questionnaire verseas Income Partnership, Trust or Estate, please supply o	of the other Accountant's c	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	n income te a separate Rental Questionnaire verseas Income Partnership, Trust or Estate, please supply obeing prepared by us alternatively advise us o	of the other Accountant's c	eceived. ontact 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:	n income  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	of the other Accountant's c	eceived. ontact 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

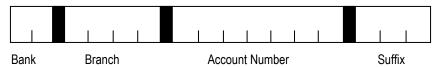
If yes, attach details.

## 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:

