

Mobile Accounting Services (1994) Ltd

PERSONAL QUESTIONNAIRE AND CHECKLIST FOR THE 2010 TAX YEAR

PERSONAL DETAILS

Name: _____

Email: _____

IRD Number: _____ - _____ - _____

AUTHORITY

I authorise Mobile Accounting Services (1994) Ltd to obtain any information necessary to complete the work required.

I authorise Mobile Accounting Services (MAS) to prepare a tax return from the information and records I have supplied and to file the completed tax return as a true and correct return on my behalf as agent. I do not wish you to complete an audit or review. I accept responsibility for the accuracy and completeness of all records and information supplied, and undertake to review the completed return and advise you of any errors or omissions within 10 days. I authorise MAS to take any outstanding amounts from IRD refund cheques if my account with MAS is overdue. I acknowledge that my tax return will not be e-filed with the IRD until my account with MAS is paid.

Accident Compensation Corporation

I authorise Mobile Accounting Services (MAS) to act as my agent for ACC levy purposes for all associated entities. This authorisation allows MAS to query and change information on my ACC levy account(s) through ACC staff, and through ACC Online Services. This authority will also allow MAS main representative discretion to delegate access to my ACC information to other members of MAS. Other delegated members of MAS will also be able to query and change information on my ACC levy account.

Signature: _____

Date: _____ / _____ / _____

Please note: Your tax return will not be filed with the IRD until this authority and completed returns are signed and your account is paid in full.

Please complete where applicable and return signed questionnaires with information required to:

**Mobile Accounting Services (1994) Ltd
1327 Victoria Street
Hamilton**

PRIVATE INCOME

1. Any employment income? **YES/NO**
(includes wages, salaries, withholding tax income, ACC, national superannuation, and any other taxable welfare payments)

Did you receive any **redundancy** pay? **YES/NO**
Gross Figure \$_____

2. Did you receive any salary, wages, fees, commission, pensions etc which has not had PAYE deducted? **YES/NO**

If **YES**, please supply details _____

INTEREST RECEIVED

Did you receive any interest from banks or any other source? **YES/NO**
If **YES**, please provide full details including any advice slips and tax deduction certificates.

DIVIDENDS RECEIVED

Did you receive any dividends, including distributions from NZ or overseas unit trusts? **YES/NO**

If **YES**, please provide full details including dividend certificates received during the period 01 April 2009 and 31 March 2010.

RENT RECEIVED

Did you receive any income from rent? **YES/NO**

If YES, please complete our rental questionnaire also

ESTATE, TRUST, COMPANY OR PARTNERSHIP INCOME

Did you receive any income from an estate, trust, company or partnership during this year? **YES/NO**

If **YES**, please provide details and advice notices received or name and address of contact person.

Are you a New Zealand resident? **YES/NO**

SELF EMPLOYED OR BUSINESS INCOME

If you received any income from self employment please provide all the relevant information and a copy of any previous accounts. *Please complete the business questionnaire also.* **YES/NO**

INVESTMENTS OVER \$50000 (Excluding Australia)

Do you have any overseas investments? **YES/NO**

If YES, we need paperwork to confirm the following:

Original Share costs

Share value as at 1/4/09

Purchases - \$ and numbers purchased during the year

Sales - \$ and numbers sold during the year

Dividends received and any tax paid details

Share value as at 31/3/10

LAQC

Are you a shareholder in a company that is a Loss Attributing Qualifying Company (LAQC)? **YES/NO**

If YES, please provide details of your share of any income or losses available in the 2010 year.

OTHER INCOME

Please provide details of any other income received from NZ or overseas such as: profit on sale of shares or other investments acquired for resale, tips, or cash jobs

YES/NO

STUDENT LOAN

Do you have a Student Loan?

YES/NO

Please note that we will not calculate your student loan repayment unless requested– Inland Revenue will advise you directly when payment is due.

EXPENSES

At present there is no deduction available for employment related expenses.

1. Did you incur any expenses against withholding payments **YES/NO**
i.e.: Your tax code is WT (Withholding Tax)

If YES, please provide a list and receipts for anything related to making that income.

2. Did you borrow any money or incur any direct costs relating to any of your investments? This includes money borrowed to purchase company shares.

YES/NO

If YES, please provide details.

3. Did you pay any income protection insurance? **YES/NO**

If YES, please provide details.

REBATES

Rebates are claimable on an IR526, separate to your income tax return. You can file this yourself OR send in your donation receipts and we will do this for you. Rebates are available for the following: (Please indicate if any of these apply to you)

Charity donations **YES/NO**

Payments to housekeeper, nanny, day nursery, playcentre or crèche when you and your spouse (if any) worked fulltime **YES/NO**

(If YES, please provide receipts.)

Please detail any other points you may think are relevant to the preparation of your financial statements and/or tax returns.

WORKING FOR FAMILIES TAX CREDITS

Family tax credits are financial help for families with children. It is made up of three types of payments and you may qualify for one or more, depending on your personal situation.

How much you can get depends on:

- How many dependent children 18 years or younger you have. This means children you support financially and who don't work more than 30 hours a week, and don't receive student allowance, benefit or other government assistance.
- How much you and your partner earn – your family income.
- Where your income comes from (for example, salary or wages, business, student allowance).

Please provide us with the following family details. If you have children you may be entitled to family support even if you haven't been receiving it.

Are you registered for Family Assistance/Working for Families Tax Credits? **YES/NO**

If not, would you like us to register the **principal child carer** for Family Assistance? If so, please supply name. **YES/NO**

Full Name _____

If you are a single parent family, do you work 20 hours or more per week? **YES/NO**

If you are a two-parent family, are your combined hours of work more than 30 hours per week? **YES/NO**

Full name of spouse or partner: _____

Spouse/partner's IRD number: ____ - ____ - ____

Spouse's taxable income: _____

Please link the above-named spouse to Mobile Accounting Services tax agency for family assistance purposes only. Signed: _____ (Spouse)

Did you receive or pay any Child Support during the year? \$ _____ **Rcd/Pd**

Did you receive any Family Tax Credit during the year? \$ _____ **Received**

Please advise of any other change in living arrangements (e.g. - separation, de facto relationship etc and dates of changes)

Full names of children (if under 18)	Dates of Birth	IRD Numbers (or birth certificate)	Date left school/home
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_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Do you share care of any of the above child/children with someone else? **YES/NO**
Please specify how many days per fortnight you have your child/children and which child/children you share care.

Please ensure we have all of the above information in order to quickly obtain any entitlements