

CLIENT INTERVIEW AND INFORMATION QUESTIONNAIRE – PERSONAL INCOME

CLIENT NAME: _____ (Note any changes here)

Birth date _____ City/town of birth _____

Postal Address _____ Home Address _____

Email Address _____ Phone Number _____

Contact Names: 1 _____ 2 _____

Enclosed
Tick Here

1. **INCOME: Please provide the following**

a) **Certificate of Earnings**

We will obtain this information from the IRD directly.

b) **Interest and Dividends**

- Interest Withholding Tax Deduction Certificates (IR15) will be sent to you by your bank, or other financial institutions. We require these for joint accounts also.
- Dividend payment advice will accompany dividend cheques indicating withholding tax deductions or imputation credits.
- Income from Portfolio Investment Entities (PIE).
- Overseas Investments – details of all foreign investments and income. Note, we require all purchase and sale documentation for overseas investments.
- Kiwisaver – we require your Kiwisaver statements to ensure you are using the appropriate withholding tax rate.

c) **Other Income and Expenses**

- Rents received (Gross Rents & Expenses).
- Income from Partnership/Trust/Estates (not prepared by us).
- Expenses to obtain self-employed income e.g. commissions.
- Any other income.

2. **REBATES: These reduce your tax liability**

a) **Donations**

Attach all receipts for **donations** to schools, churches, charitable organisations.

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b) **Tax credits For Working Families (Formerly Family Assistance)**

- Attach names of children, **birth dates** and other changes in your family during the year.
- Did you and your spouse work more than 30 hours per week between you during the year?
Yes/No If so, for how many weeks of the year?weeks

3. **Student Loans**

Do you have a student loan? If so, please supply details

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4. **Child Support**

Did you receive/pay any Child Support during the year? If so, please supply details.

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5. **Income Protection Insurance**

Please provide details

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I confirm that there is no change in circumstances that requires an update of our Terms of Engagement. A copy of the Terms of Engagement is available on our website.

CLIENT SIGNATURE:..... DATE:.....