

Financial Statements – 2023

Individual Questionnaire



Client / Entity Name	
Balance Date	31 st March 2023
Email	
Mobile Phone	

Please sign the authorisation below, complete this questionnaire and send to us along with your records.

Authorisation to Access Information

To: Lynda Stevenson Chartered Accountants Limited.

You are hereby authorised to communicate with my/our bankers, solicitors, finance companies and all government agencies to obtain such information as you require in order to carry out the preparation of my/our financial statements and tax returns.

I/We authorise you to act as my/our Agent for Inland Revenue Department matters, and to have access to all tax types and all tax information pertinent to the completion of my financial statements and tax returns until further notice. This includes obtaining information through all Inland Revenue media and communications channels.

I/We accept responsibility for the accuracy of the information provided to you. I/We are also responsible for any tax consequences that result.

Signature _____

Date _____

**Thank you for completing the questionnaire
Please ensure you sign this page**

Records Required For 12 months to Balance Date	✓	Comment
Interest Received		
This information is now provided by Inland Revenue		
Dividends Received		
A dividend payment advice will accompany dividend payments received indicating withholding tax deductions or imputation credits. Please provide details of ALL dividends received and share investments.		
Other Income & Expenses		
<p>Self Employed Income Please complete Business Questionnaire.</p> <p>Residential Rents Received Please complete Rental Questionnaire.</p> <p>Partnerships/Trusts/Estates/Other Companies Income from Partnerships/Trusts/Estates/Other Companies, where accounts are prepared by another accountant.</p> <p>Overseas Investments Details of all foreign investments and income.</p> <p>Income Protection Insurance Please supply details of Income Protection Insurance paid during the financial year.</p>		
Rebates (Reducing Your Tax Liability)		
<p>Donations Attach all receipts for donations to schools, churches, charitable organisations. Minimum donation is \$5.</p>		Name _____ Total \$ _____ Name _____ Total \$ _____ Name _____ Total \$ _____ Name _____ Total \$ _____

Student Loans

Do you have a student loan? If so, please provide any information on the loan you have received from StudyLink and Inland Revenue

Working for Families

Please supply full names and birth dates of all children. Note the following;

- If you had a child born within the current financial year you may be eligible for the Best Start Tax Credit, please include a copy of the child's birth certificate or their IRD number if you already have one.
- Where a child is now financially independent during the current financial year, please advise the date they left school.
- Where Child Support is paid or received please provide details of amount received/paid. **We cannot access this information from Inland Revenue directly.**

If you have received Working for Families during the year, please supply the certificate issued to you.

Also provide details of any maintenance payments made or received.

<u>Child's Name</u>	<u>IRD No.</u>	<u>Date of Birth</u>	<u>Date left School</u>
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Other Information

Details of anything else we should be aware of in relation to the preparation of your accounts.

Thank you for completing this questionnaire

Don't forget to sign the Authorisation on page 1