



# Your personal information

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Required for financial year end 31 March 2011

# Your details

## Personal details

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Name

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IRD number

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Contact details – to ensure our records are up to date, please complete the following method

Preferred contact

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Home phone

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Fax

---

Work phone

---

Mobile

---

Email

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Website

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Home address

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Please sign the Privacy Act authorisation on page 3

# Privacy Act authorisation

1. I/We authorise Business Advisory Accounting & Tax Services Limited to act on my/our behalf in respect of the Inland Revenue Department for the purposes of obtaining any information necessary with regard to the administration of my/our income tax account (and other tax accounts) as they deem relevant.
2. I/We authorise any person or company to provide Business Advisory Accounting & Tax Services Limited with such information as Business Advisory Accounting & Tax Services Limited may require to complete the Financial Statements, and/or Tax Return, and any other work Business Advisory Accounting & Tax Services Limited carries out on behalf of myself/ourselves.
3. I/We further authorise Business Advisory Accounting & Tax Services Limited to furnish to any third party, financial information of mine/ours as Business Advisory Accounting & Tax Services Limited sees appropriate that is requested in furtherance of our business activities.
4. I/We accept responsibility for the accuracy and completeness of the information supplied. You are not required to complete an audit, nor do I/we wish you to undertake a detailed review of my/our affairs in order for you to substantiate the accuracy of the information I/we have supplied you, and therefore you are not asked to provide any assurance on my/our financial statements. I/we acknowledge that your work cannot be relied upon to detect error and fraud and that the financial statements and/or tax return(s) will be prepared at my/our request and for my/our purposes only and that you will not be liable for any losses, claims or demands by any 3<sup>rd</sup> party.
5. I/We authorise Business Advisory Accounting & Tax Services Limited to act on my/our behalf in respect of the Accident Compensation Corporation (ACC) for the purposes of querying and/or changing information on my/our ACC levy account(s) through ACC staff, and through ACC Online Services. This authority will also allow Business Advisory Accounting & Tax Services Limited's main representative discretion to delegate access to your ACC information to any member of Business Advisory Accounting & Tax Services Limited. Other delegated members of Business Advisory Accounting & Tax Services Limited will also be able to query and change information on your ACC levy account.
6. I/we have been advised of the basis that you charge your fees and that I/we have been provided with and read your terms and conditions. By signing this document, I/we agree to be bound by them. Should you not receive such a signed copy but I/we continue to instruct you, then I/we acknowledge that I/we have accepted the terms and conditions and your terms of business.

Name

Signed

Date

# Your income

Indicate whether you had income from the following sources and attach relevant documentation e.g. interest and dividend certificates, etc.

1 Wages or Salaries, New Zealand superannuation or income support		Yes	No	N/A	BAS use
1	Did you receive salary and/or wages?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	Did you receive New Zealand Superannuation?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3	Did you receive any taxable benefits (e.g. unemployment benefits or ACC payments). If yes, detail type of benefit received below:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	i				
	ii				
	iii				
	iv				
	v				
2 Interest (New Zealand)		Yes	No	N/A	BAS use
1	Did you receive any NZ sourced interest during the year? If yes, attach resident withholding tax (RWT) certificates and detail sources below. Please note that banks will only issue certificates for interest received over \$50. However, you are required to account for all your interest income and therefore you should request certificates from your bank irrespective of how much interest is earned.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Name of Bank				Inland Revenue Department
	Name of Bank				Other - name
	Name of Bank				Other - name
	Name of Bank				Other - name

3 Dividends (New Zealand)		Yes	No	N/A	BAS use				
1	Did you receive any NZ sourced dividends during the year (including from your power suppliers)? If yes, attach dividend statements and detail sources below:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
<p>Company name(s)</p> <hr/> <hr/>									
2	Have you sold or purchased any shares during the year including any dividend reinvestment plans? If yes, attach all relevant statements.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
4 Portfolio investment entities (PIEs)		Yes	No	N/A	BAS use				
1	Did you have any investments in PIEs? If yes, attach any investment summary schedules received for the year including details of the Prescribed Investor Rate (PIR) used.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
5 Estate or trust income		Yes	No	N/A	BAS use				
1	Did you receive income from an estate or trust? If yes, provide full details including:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
<table border="0"> <tr> <td>Name</td> <td>IRD number</td> </tr> <tr> <td>Type of Income</td> <td>Amounts</td> </tr> </table>		Name	IRD number	Type of Income	Amounts				
Name	IRD number								
Type of Income	Amounts								
5 Overseas income		Yes	No	N/A	BAS use				
1	Did you receive income from the following sources? Specify currencies for each below and date of receipt.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
i	Overseas interest or dividends? If yes, attach interest/dividend statements	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
<table border="0"> <tr> <td>Name</td> <td>Advise principal invested overseas</td> </tr> </table>		Name	Advise principal invested overseas						
Name	Advise principal invested overseas								
ii	Overseas pension scheme? If yes, provide full details:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
Name									
iii	Other overseas income? Provide details of any other income from overseas (please also refer to question 20 on page 8).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				

7 Partnership		Yes	No	N/A	BAS use
1	Did you receive income from an estate or trust? If yes, provide full details including:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Name		IRD number			
Type of Income		Amounts			
8 Shareholder/employee salary		Yes	No	N/A	BAS use
1	Have you earned any salary from a company (with no PAYE deducted) in your capacity as a shareholder/employee? If yes, provide full details:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Name of Company		Amount			
9 Rental income		Yes	No	N/A	BAS use
1	Did you receive any rental income during the year?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Rental property address:					
2	Attach details of rents received and expenses incurred (eg mortgage interest, rates, insurance, repairs, etc)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3	If you commenced or ceased renting during the year, provide details of the dates. If possible, provide copy of latest Government valuation or independent valuations.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10 Self-employed/farming income		Yes	No	N/A	BAS use
1	Did you receive any self-employed or farming income during the year? If yes, attach details of income and expenses.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11 Other income		Yes	No	N/A	BAS use
1	Did you receive any other income during the year, e.g. sale of land and/or building; sale of shares or securities; cash jobs; tips. If yes, provide full details.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12 Losses brought forward		Yes	No	N/A	BAS use
1	Are there any claimable losses brought forward from previous years?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

13 Partnership		Yes	No	N/A	BAS use
1	Did you receive income from an estate or trust? If yes, provide full details including:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Name				
	IRD number of LAQC	Amount of loss			
14 Expense against income		Yes	No	N/A	BAS use
1	If you received income from schedular payments (previous withholding payment income) or were self-employed, do you have any expenses you can claim against this income? If yes, provide full details.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
15 Accident Compensation Corporation (ACC)		Yes	No	N/A	BAS use
1	Provide copies of all invoices issued to you by the ACC during the year.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
16 Income protection insurance		Yes	No	N/A	BAS use
1	Do you have income protection insurance? If yes, provide full details:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	i copy of policy/invoice (in order to determine tax deductibility)				
	ii insurance company				
	iii What is the premium payment?	<input type="checkbox"/> per month	<input type="checkbox"/> per annum		
17 Student loan		Yes	No	N/A	BAS use
1	Did/do you have a student loan?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
18 Donations/housekeeper or children rebate		Yes	No	N/A	BAS use
1	Did you make any donations during the year? If yes, attach all receipts.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<b>Note:</b> You can claim a rebate for each of the following, as long as you donate or pay \$5 or more:				
	• donations to any IRD approved charitable (donee) organisations				
	• donations to any school (including schools for the disabled), to school Board of Trustees, or parent teacher associations. These payments must be donations, not payment of activity or stationery fees				
	• payment of state school fees, as long as these go to the school's general fund. You cannot claim fees for tuition, specific activities such as school trips, or attendance dues.				
2	Did you pay a housekeeper (and are physically disabled) or childcare because both parents were working? If yes, provide full details and receipts.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

19 Working for families tax credits (WFTC)		Yes	No	N/A	BAS use
1	Do you think you may be entitled to WFTC? If yes, provide the following details:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	i Name of principal caregiver				
	ii Children for whom you were the "principal caregiver"				
					Were you the principal caregiver for the whole year?
	Name	Date of Birth	IRD number		<input type="checkbox"/> Yes <input type="checkbox"/> No
	_____	_____	_____		<input type="checkbox"/> Yes <input type="checkbox"/> No
	_____	_____	_____		<input type="checkbox"/> Yes <input type="checkbox"/> No
	_____	_____	_____		<input type="checkbox"/> Yes <input type="checkbox"/> No
	_____	_____	_____		<input type="checkbox"/> Yes <input type="checkbox"/> No
2	Have you registered with the Inland Revenue Department for WFTC?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3	Are you eligible for an in work tax credit? If yes, please advise the number of weeks where you worked more than 20 hours per week for a solo parent or more than a combined 30 hours per week for a couple.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
20 Overseas holdings		Yes	No	N/A	BAS use
1	Provide full details of any holding in offshore entities, for example:				
	• Bank accounts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	• Superannuation schemes				
	• Unit Trusts				
	• Life insurance policies				
	• Shares in overseas companies				
	• Loans to foreign entities				
	Note: If you have offshore investments we will need to contact you in relation to applying the foreign investment fund (FIF) rules.				
21 Sundry		Yes	No	N/A	BAS use
1	Did you purchase or sell any government or local body stock or corporate bonds this year? If yes, provide documentation.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	Are you considered a tax resident of another country? Please advise what country:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3	If you have relocated to New Zealand during the year, please advise date of relocation (entry):	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4	Did you acquire any shares or exercise any rights or options to acquire shares under an employee share or option scheme?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5	Have you recently reviewed your business and personal insurances?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6	Have you recently reviewed your will?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7	Have you settled a trust during the year?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

21 Sundry (continued)		Yes	No	N/A	BAS use
8	Have you made any gifts during the year? If yes, please provide certificates.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9	Do you wish to discuss trusts?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10	Do you wish to discuss any other relevant issues?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
22 Changes in income for the 2011/2012 year notes		Yes	No	N/A	BAS use
1	Has your income changed/or will be likely to change for the coming year? This is particularly relevant for provisional taxpayers.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
23 Do you have any other information that you consider relevant? Please note below		Yes	No	N/A	BAS use

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