CLIENT INTERVIEW AND INFORMATION QUESTIONNAIRE – 2020 PERSONAL INCOME

CLIENT NAME: ____ (Note any changes here)

Birth date ____________________________ **City/town of birth** __________________________

Postal Address ____________________________ **Home Address**s ____________________________

____________________________ ____

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. ☐

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 ☐

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

5. **Income Protection Insurance**
Please provide details ☐

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:……………………