



## 2018 INDIVIDUAL QUESTIONNAIRE

**FULL NAME:**

*Circle Answer*

- 1 SALARY / WAGES / SUPERANNUATION / WINZ BENEFITS** Yes No N/A  
 Please indicate if you received any of the following and provide details. In most cases the IRD have sent us this information, **but we need an estimate from you**

	Employer Name	Estimated Gross Income	Estimate PAYE / WHT / Tax
Salary / Wages / or WHT Income	1. 2. 3.		
ACC			
Superannuation / WINZ			

- 2 OCCUPATION**  
 Please write in a description of your occupation \_\_\_\_\_

- 3 STUDENT LOAN** Yes No N/A  
 Do you have a student loan?  
**If so we need you to complete an IR215 adjustment to income form – ring us to email it to you**

- 4 INTEREST RECEIVED** Yes No N/A  
 Attach Interest certificates – including statements for PIE's so we can check PIR rate etc and advise

- 5 DIVIDENDS RECEIVED** Yes No N/A  
 Attach Dividend certificates

- 6 OVERSEAS INCOME** Yes No N/A  
 Provide details of all non-NZ income – this can include interest / dividends / life insurance policies / superannuation policies / bank accounts / shares or other investments. If you have any of these please provide full details for us to assess need to include in your tax returns

- 7 LOOK THROUGH COMPANY (LTC)** Yes No N/A  
 Please provide details of LTC income or loss (*only if NOT prepared by Evelyn Mae Ltd*)

- 8 CASH JOBS** Yes No N/A  
 Did you do any cash jobs? If yes, please provide details

- 9 OTHER INCOME DETAILS** Yes No N/A  
 Please provide details of any Business, Partnership, Rental Income (Loss), or Company income (*only if NOT prepared by Evelyn Mae Limited*)

- 10 SHARE TRADING** Yes No N/A  
 Have you been involved in share or futures trading?

11 **LOSS OF EARNINGS / INCOME PROTECTION INSURANCE (NOT Life Insurance)** Yes No N/A  
 Please attach statement from insurance company

12 **DONATIONS / CHILDCARE REBATE - Send original receipts NOT photocopies**  
*If you wish us to complete your IR526 please send in all the ORIGINAL receipts:*

a) Donations – attach **original** (not photocopies) receipts Yes No N/A  
 b) School fees – attach **original** (not photocopies) receipts Yes No N/A  
 c) Childcare – attach **original** (not photocopies) receipts Yes No N/A

13 **WORKING FOR FAMILIES TAX CREDITS (WFFTC)**  
 Please complete the details below if you believe there may be an entitlement Yes No N/A

<i>Childs Full Name</i>	<i>Date of Birth</i>	<i>IRD Number</i>	<i>Attend School</i>
			Yes / No
			Yes / No
			Yes / No

*IRD relies on the information you provide. You are responsible for advising IRD of any changes in your circumstances regarding partner changes, custody changes, children leaving school etc.  
 We are able to estimate your WFFTC only if you provide all the correct details, but remember it is only an estimate. Our system does NOT inform IRD of any changes - that is your responsibility.*

If so we need you to complete an **IR215** adjustment to income form.- ring us to email it to you.  
 AND Supply all details of custody, income from other sources, child support etc for us to estimate

14 **WEEKS & NUMBER OF HOURS WORKED – for WFFTC ONLY** Yes No N/A  
 Please indicate for each employer how many weeks worked, and an average hours worked per week.  
**Remember to include your own business or company on the list**

<i>Employer Name</i>	<i>No. of weeks worked</i>	<i>Average no. of hours worked per week</i>

15 **CORRESPONDENCE & NEWSLETTERS** Via Email or NZ Post

16 **BANK ACCOUNT NUMBER - Please enter the account number for any tax refund if applicable**

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17 **UPDATE CONTACT DETAILS - PLEASE complete email / phone even if you think there are no changes**

**Postal Address:** .....  
 .....  
 .....  
 .....  
 .....  
**Physical Address:** .....  
 .....  
 .....  
 .....  
**Work Phone:** .....  
**Home Phone:** .....  
**Fax Number:** .....  
**Cellphone:** .....  
**Email:** .....

18 **OTHER INFORMATION AND INTENTIONS** Yes No N/A

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