

FINANCIAL STATEMENTS QUESTIONNAIRE – 31 MARCH 2021

PERSONAL

CLIENT NAME: _____

1.	Income Did you receive any income from paid wages / Superannuation? If yes, the IRD will send us your Summary of Earnings automatically.	Yes	No
2.	Rebate Information How many weeks of the year were you in paid employment for at least 20 hours per week? <div style="text-align: center; margin-top: 10px;">_____</div>		
3.	Other Income Did you receive any other income, for example, estates or trusts, overseas, annuity or pension? If yes, please provide details of this.	Yes	No
4.	Interest / Dividend Income Did you receive any income from interest or dividends? If yes, please provide interest and dividend advice notices.	Yes	No
5.	Overseas Income/ Investments Did you receive any income from or while you were overseas or have any overseas investments? If yes, please provide advice notices.	Yes	No
6.	Rental Property owned in your personal name Did you receive any rental income this year? If so please also complete a Rental Questionnaire.	Yes	No
7.	Income Protection Insurance Did you have Income Protection Insurance? If yes, please attach a copy of the invoice and policy.	Yes	No
8.	Donations Did you make a donation to a charitable Trust during the year? If yes, please provide receipts and or details of how much was paid, when and whom.	Yes	No
9.	Working For Families Tax Credits Did you receive Family or Child Support during the year? If yes, please supply the following details: <ul style="list-style-type: none"> • Names of children (complete table below). • Did you pay for childcare assistance either at a crèche, day nursery, playcentre or kindergarten while working? • Please provide receipts where applicable. 	Yes	No

10.	Names of Children (who were cared for and financially dependent on you)	IRD Number	Date of Birth
11.	Bank Account Number for tax refund (if applicable): <hr/>		

Authorisation – Name:

I / We hereby instruct Coombe Smith to prepare my / our Financial Statements and Taxation Returns for the year / period ending 31 March 2021. I / We undertake to supply all information necessary to carry out such services, and will be responsible for the accuracy and completeness of such information. Your services are not intended to, and accordingly will not result in the expression by you of an opinion on the Financial Statements in so far as third parties are concerned, or in the fulfilling of any statutory audit requirements.

I/We also authorise Coombe Smith to act as our agent for ACC levy purposes. This authorisation allows you to query and change information on my/our ACC levy account(s) through ACC staff, and through ACC Online Services – (if required).

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 carrying out the above assignments.

Signed _____ Signed _____