

**ANNUAL INDIVIDUAL
INFORMATION SHEET – 2015**

Please study the attached questionnaire carefully and answer those questions and provide those records which are applicable to your business. This information and the required records are essential for the completion of your accounts and provided they are passed in to this office promptly, your accounts should be processed with minimal delay.

TERMS OF ENGAGEMENT

I/We accept responsibility for the accuracy and completeness of the information supplied which is to be used in the preparation of my financial statements. You are not to complete an audit, nor do I/we wish you to undertake a detailed review of my/our affairs in order to substantiate the accuracy of my information, and therefore you are unable to provide any assurance on my/our financial statements. I/we understand your work cannot be relied on to detect error and fraud and that you accept no liability for the accuracy and completeness of the information supplied by me/us. I/we further understand that the financial statements 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 third person.

I/we also accept responsibility for all other records and information supplied to you other than those listed. I/we accept responsibility for any failure by me/us to supply all relevant records and information to you.

I/we authorise Peters Doig Limited to act as your agent for ACC levy purposes for all associated entities. This authorisation allows us to query and change information on your ACC levy account(s) through ACC staff and online services. This authority will also allow us discretion to delegate access to your ACC information to other members of our organisation. Other members of our organisation will also be able to query and change information on your ACC levy account.

In terms of the Privacy Act I/we hereby authorise Peters Doig Ltd, to obtain copies of missing statements, details of any blank cheques or deposits and any other information required from my/our bank/stock firm/solicitor etc and I/we hereby authorise the bank/stock firm/solicitor/financial institution etc to provide the required information.

I/we authorise Peters Doig Limited to deduct any outstanding accounting fee directly from any Inland Revenue refund cheque and if further fees are incurred due to debt collection these will be recoverable.

I/we give authority to Peters Doig Limited as tax agent to obtain information on my/our behalf from the Inland Revenue Department via 'Online Services', phone, fax, email and mail for all tax types.

I/we also authorise Peters Doig Limited to forward a copy of my/our financial accounts to our bank on request.

<u>Name</u>	<u>IRD Number</u>	<u>Signature</u>	<u>Date</u>
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Please complete for entity and all related parties/persons/individuals, please add on separate sheet if required

Information Required	Comments/Notes
<p>Income Wage Summaries and NZ Superannuation Summaries come directly to us from IRD; however it is helpful if you had more than one job to list these.</p>	
<p>Rental Properties To help us to easily complete your rental account please provide the following details:</p> <ul style="list-style-type: none"> • Total gross rental received (include number of weeks rented) • Rates and insurance paid • Details of loans – interest paid and year end balance • Letting or management fees • Repairs and maintenance – include details of any individual items over \$500. • Details of any other property expenses <p>If any new properties have been purchased during the year please provide a copy of the legal settlement statement and something (such as a rates account) with the Government Valuation detailed.</p>	
<p>Other Income</p> <p> <input type="checkbox"/> Notices for Dividend & Imputation Credits <input type="checkbox"/> Income in an Estate <input type="checkbox"/> Notices for Interest & Withholding Tax <input type="checkbox"/> Trust or Partnership Income <input type="checkbox"/> Notices for Bonus Issue Shares <input type="checkbox"/> Overseas Income <input type="checkbox"/> Director Fees/Shareholder Salaries from Other Entities </p> <p>Other Income Do you have investment in shares other than those listed on the NZ and Australian stock exchanges? If yes, then we require full details. (For individuals it applies only to your overseas investments over \$50,000).</p> <p>Short Term Accommodation Rental If you own a holiday home which is rented out and also used personally, please let us know.</p> <p>Prescribed Investor Rate If you have PIE income (e.g. Kiwisaver) please provide copies of the annual summary from the provider so we can check the correct amount of tax is being deducted.</p>	
<p>Donations If you want us to claim on your behalf, please put your receipts in a separate envelope. Donations have no rebate limit so please retain all donations receipts.</p>	
<p>Working for Families Please provide details so we can ascertain any payment due to you from IRD.</p> <p> <i>Childs Name</i> _____ <i>DOB</i> _____ _____ _____ _____ _____ </p>	<p><i>IRD Number</i></p> <p>_____</p> <p>_____</p>
<p>Your Contact Details</p> <p>Contact Numbers <u>Home:</u> _____ <u>Cell:</u> _____</p> <p>Email Address _____</p> <p>Change of Address _____ (if <u>not</u> correct on first page) _____</p> <p>Would you like us to supply a copy to your Bank? _____</p> <p>If yes: Name of Consultant _____</p> <p>Email Address of Consultant _____</p>	<p>Bank Account for IRD Refunds</p> <p>Name of Bank & Branch _____</p> <p>Account Number _____</p> <p>Name of Account _____</p>
<p>Final Date for filing your Income Tax Return is 31 March 2016</p>	