

Individual Questionnaire 2021

Ensure this questionnaire is completed and included with your records

Client Name:		Address:	
Balance Date:		Phone:	
		Email:	

To: McCoy & Co Ltd

Terms of Engagement

I hereby instruct you to prepare our Taxation Returns for the 2021 year. I undertake to supply all information necessary to carry out such services, and will be responsible for the accuracy and completeness of such information. You are hereby authorised to communicate with my bankers, solicitors, finance companies and all government agencies to obtain such information as you require in order to carry out the above assignments.

You are to represent me/us as my/our tax agent. All income tax returns will be signed by me/us however you are authorised to sign any other taxation return on behalf of myself/ourselves or any of my/our associated entities.

I/We also accept that you have the right to charge interest on overdue accounts at the rate of 2.0% per month, and that all accounts are due for payment by the 20th of the month following invoice date. The charging of such interest will be at your discretion. I/We accept that any collection costs you incur will be fully recoverable from me/us.

Accident Compensation Corporation

I authorise your organisation to act as my agent for ACC levy purposes for all associated entities. This authorisation allows your organisation to query and change information on my ACC Levy account(s) through ACC staff, and through ACC Online Services. This authority will also allow your organisation's main representative discretion to delegate access to my/our ACC information to other members of your organisation. Other delegated members of your organisation will also be able to query and change information on my/our ACC Levy account.

All other terms and conditions of this engagement are the same as those referred to on the McCoy & Co Ltd website www.mccoyandco.co.nz

Signature _____ Date _____

Tax Refunds

Please provide the bank account number that you would like any tax refunds credited into.

Bank account ____ / ____ / ____ / ____

Records Required	Comments																												
<p>Wages/National Superannuation/Benefits</p> <p>Please provide us with the names of any organisations you have received the following from:</p> <ul style="list-style-type: none"> • Wages • ACC payments • National Superannuation • Any other benefits <p>In most cases IRD will have sent us these details direct, however we do need to check all details have been included.</p>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>																												
<p>Interest and Dividends</p> <p>Please supply the advice slips.</p> <ul style="list-style-type: none"> • For interest received, you should have an annual advice notice showing the withholding tax deducted. This may be on the bottom of your bank statement dated 31 March. • If any dividends are taken as bonus shares, also include these advice slips. 	<input type="checkbox"/> <input type="checkbox"/>																												
<p>Rental Income and Expenditure</p> <p>If you use a rental agency to manage your rental property. Please provide the year end statement. Please supply bank statements clearly identifying and detailing all transactions that relate to the rental properties.</p> <p>OR</p> <p>Please provide details of the following for each rental property. Use a separate sheet if necessary.</p> <p>Income:</p> <p>Total Rent Received \$ _____</p> <p>Expenses:</p> <table style="width: 100%; border: none;"> <tr> <td style="width: 50%;">Accounting fees \$ _____</td> <td style="width: 50%;">Phone \$ _____</td> </tr> <tr> <td>Advertising (to rent) \$ _____</td> <td>Power \$ _____</td> </tr> <tr> <td>Bank fees \$ _____</td> <td>Rates \$ _____</td> </tr> <tr> <td>Insurance \$ _____</td> <td>(including regional council rates)</td> </tr> <tr> <td>Legal fees \$ _____</td> <td>Repairs and Maintenance \$ _____</td> </tr> <tr> <td>Management fees \$ _____</td> <td>(please attach details or invoices)</td> </tr> <tr> <td>Mortgage Interest \$ _____</td> <td>Valuation fees \$ _____</td> </tr> <tr> <td>(attach copy of loan summary/statements from bank)</td> <td>Water rates \$ _____</td> </tr> </table> <p>Details of any other expense relating to rental property:</p> <p>_____ \$ _____</p> <p>_____ \$ _____</p> <p>Details of visits to inspect property/conduct property business:</p> <table style="width: 100%; border: none;"> <thead> <tr> <th style="width: 15%;">Date</th> <th style="width: 65%;">Details</th> <th style="width: 20%;">Kilometres</th> </tr> </thead> <tbody> <tr> <td>_____</td> <td>_____</td> <td>_____</td> </tr> <tr> <td>_____</td> <td>_____</td> <td>_____</td> </tr> <tr> <td>_____</td> <td>_____</td> <td>_____</td> </tr> </tbody> </table>	Accounting fees \$ _____	Phone \$ _____	Advertising (to rent) \$ _____	Power \$ _____	Bank fees \$ _____	Rates \$ _____	Insurance \$ _____	(including regional council rates)	Legal fees \$ _____	Repairs and Maintenance \$ _____	Management fees \$ _____	(please attach details or invoices)	Mortgage Interest \$ _____	Valuation fees \$ _____	(attach copy of loan summary/statements from bank)	Water rates \$ _____	Date	Details	Kilometres	_____	_____	_____	_____	_____	_____	_____	_____	_____	<input type="checkbox"/> <input type="checkbox"/>
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Records Required	Comments
Home Office Expenses (if applicable)	
<p>If part of your home is set aside principally for use as an office/workshop/storage area which is used by you in relation to your rental property, you may be able to claim a proportion of your home expenses against your rental income. Please provide the following details:</p>	
Area used for business: _____ m ²	
Total area of house and workshop: _____ m ²	
Power \$ _____	
Phone \$ _____	
Rent \$ _____	
Insurance (Building and Contents) \$ _____	
Interest (House Mortgage) \$ _____	
Rates (including regional council rates) \$ _____	
Repairs and maintenance \$ _____	
Other \$ _____	
Total \$ _____	
Cost of House and Section \$ _____	
Cost of Section \$ _____	
Construction materials: (timber, brick, etc)	
Other Details Required (if applicable)	
<ul style="list-style-type: none"> • Solicitors Settlement Statement <input type="checkbox"/> • Sale and Purchase Agreement <input type="checkbox"/> • Loan details for property purchased <input type="checkbox"/> • A copy of the latest Rateable Valuation <input type="checkbox"/> • A list of chattels with their dates and value for properties bought or sold during the year <input type="checkbox"/> 	
Partnerships, Trusts, Estates and Companies	
Please supply details of income earned from any entity for which we do not prepare the accounts and tax returns. <input type="checkbox"/>	
Insurance	
Income Replacement Insurance Policy – provide details of: <input type="checkbox"/>	
<ul style="list-style-type: none"> • Premiums paid during the year • Any claims • Please supply a copy of the tax certificate 	
Any Other Income	
Look Through Company – if you have been allocated a share of a loss other than from a company that we are aware of, please provide details. <input type="checkbox"/>	
Other - please provide details and relevant documents. <input type="checkbox"/>	
Donations	
Do you want us to complete your rebate claim form? Yes <input type="checkbox"/> No <input type="checkbox"/> <input type="checkbox"/>	
If so, please attach receipts.	

Records Required	Comments
Working for Families Tax Credits and Parental Tax Credit	
<p>We no longer calculate your working for families entitlements with your tax return, the Inland Revenue will carry out their own calculations. To avoid overpayments, please ensure you update Inland Revenue, if there have been any changes to your family circumstances or income. We are happy to help if you think there has been an error with Inland Revenue's calculation.</p>	
Best Start (also known as Best Start tax credit)	
<p>Is a government payment of \$60 a week for each child born on or after 1 July 2018. If you're a New Zealand resident you can get Best Start payments until your child turns 1, no matter what you earn. You can apply for Best Start payments when you register your child's birth.</p>	
Residential Land Withholding Tax	
<p>Have you sold residential property in New Zealand where Residential Land Withholding Tax has been deducted and paid to the IRD? If so, provide details e.g. IR1100 Residential land withholding tax return and other sale and purchase documents.</p>	
Residential Property Sales	
<p>Have you sold any residential property during the year (not otherwise detailed on the information provided)?</p> <p>If yes, when was the property purchased? _____</p> <p>If it was purchased within 5 years of the sale date,</p> <ul style="list-style-type: none"> • what was the original purchase price \$ _____ • and the sale price? \$ _____ 	<input type="checkbox"/>
Cryptoassets	
<p>Have you received or traded in cryptoassets during the income year? If so, please provide the following information:</p> <ul style="list-style-type: none"> • The type of cryptoasset • For each transaction provide the date, type of transaction i.e. received or disposed of, number of units, value in NZD • Total units of each cryptoasset held at the beginning and end of the year • Exchange records and bank statements • Wallet addresses 	<input type="checkbox"/>

**Thank you for completing this questionnaire.
Don't forget to sign it.**