

PKF CARR & STANTON LTD

Individual Questionnaire – 2011

Ensure this questionnaire is completed and included with your records

PERSONAL DETAILS - INFORMATION SHEET

Phone Nos - Home _____
 - Business _____
 - Mobile _____
 - Fax _____
 - Email _____
 Date of Birth: _____

(Completed form must be **signed** and returned with all relevant information attached)

Terms of Engagement

I hereby instruct you to prepare my Taxation Return for the 2011 year. I undertake to supply 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.

All other terms and conditions of this engagement are the same as those referred to in the Engagement Letter I have signed.

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

Taxation Refund

In the event of a tax refund I authorise / do not authorise (delete one) PKF Carr & Stanton Ltd to deduct my accountancy fees from the refund.

Accident Compensation Corporation

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

Signature _____ Date _____

Records Required	√	Comments
Wages/National Superannuation/Benefits		
Please provide us with the names of people you have received the following from: <ul style="list-style-type: none"> • Wages • ACC Payments • National Superannuation • Any other benefits In most cases IRD will have sent us these details direct, however we do need to check all details have been included.	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	
Interest and Dividends		
Please supply the advice slips. <ul style="list-style-type: none"> • For interest there will be an annual advice notice showing the withholding tax deducted. • If any dividends are taken as bonus shares include these advice slips also. 	<input type="checkbox"/>	

<u>Child's Name</u>	<u>IRD No.</u>	<u>Date of Birth</u>	<u>Date left School</u>
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

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