

**PLEASE ANSWER ALL QUESTIONS EVEN IF IN THE NEGATIVE OR N/A.** Please review the following questions carefully. Where lists of information are required use the back of the form or attach a separate schedule. If you require any assistance completing the form, please give us a call.

**Client Name** .....

**Tick ✓ or N/A**

**Details of Children Living With You**

Ensure that you have completed this block in the Pink Personal Questionnaire.

**Do You Have A Shared Care Arrangement?**

If so, please provide details, including how many nights per fortnight you have care:

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**Details of Spouse's Income**

To make a claim for **Working for Families Tax Credits**, we need to know the income for both spouses. If we do not prepare tax returns for your spouse, please provide us with his/her name, IRD number and total income. We need details of income, even if your spouse is not a New Zealand resident.

Spouse's Full Name: .....

Spouse's IRD Number: .....

Spouse's Total Income from 1 April 2016 to 31 March 2017: .....

**Child Support or Maintenance**

Please give us details of any child support payments that you **received or paid** via the IRD or any child maintenance payments you received or paid directly from/to a former partner for the year ended 31 March 2017.

**Hours Worked** - Did you or your partner work 30 hrs or more p.w. for 52 weeks of the year? **Yes / No**

- If single did you work 20 hrs or more p.w. for 52 weeks of the year? **Yes / No**

If not, how many hours per week on average did you work: .....(him) .....(her)

How many weeks in the year did you work these hours: .....(him) .....(her)

Please specify dates: .....

**Children's Passive Income**

Do any of your children earn income of more than \$500 a year from interest, dividends, rents, any other investments, or trust distributions? If so, please provide all details of income, including interest and dividend slips, and accounts for rental income or trusts.

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Tick ✓ or N/A

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**Benefits & Allowances** – Did you or any of your children receive any benefits from Work and Income? This includes student allowances, hardship grants, or any other kind of grant or benefit received from WINZ, other than NZ Superannuation. Please attach list **or** supply statements from WINZ, and provide the dates you received them:

Type of Benefit: .....

Dates Received – from: ..... to: .....

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**Fringe Benefits**

Do you or your spouse receive fringe benefits (eg a company car, low interest loan) from any company your family interests control, where we don't prepare accounts for that company? If so, please provide details.

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**Income From Trusts, Companies or Partnerships**

You may have income or capital distributions from Trusts, Companies or Partnerships that we **don't** prepare the accounts for. If this is the case, please provide us with the name of the Entity, and the name and contact details of the accountant that prepares the accounts for that Entity.

Trust Name: .....

Accountant's Name: .....

Accountant's Contact Details: .....

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**Portfolio Investment Entities (PIE) Income**

A portfolio investment entity (PIE) is an organisation (such as a managed fund) that invests the contributions from investors in different types of investments. Do you have any money invested in an investment scheme other than KiwiSaver or any other superannuation scheme? If you are able to withdraw the income from your PIE at any time, you need to provide us with details of that income.

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**Exempt Salary and Wages**

Do you receive any salary or wages from organisations that are exempt from paying income tax (eg the United Nations, the OECD, diplomatic services). If so please provide details of this income, with supporting documents (eg pay slips, annual summary of earnings).

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**Income Equalisation Scheme Income**

For farming clients only, have you deposited any funds into the Government Income Equalisation Scheme? If so, please provide the amount and date of the deposit.

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**Pensions or Annuities**

Do you receive income from a pension fund or an annuity, which isn't taxed? If so, please provide full details of all amounts received during the year, with supporting documentation.

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Tick ✓ or N/A

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**Other Payments**

Did you receive any other money to help you in covering your usual living expenses, such as regular payments from family members, payments from a trust, non-commercial loans where you didn't have to pay interest, having someone pay your personal bills (such as someone paying your power bills directly to the company), payments from an insurance company for loss of income?

If you received any other income of this nature that came to more than \$5,000 over the year, please provide us with details.

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**TERMS OF REFERENCE**

To *Robertson Fulton Limited*

I instruct you to prepare my Financial Accounts and Taxation Returns for the current period. I undertake to supply all information necessary to carry out such services, and will be responsible for the accuracy and completeness of such information. I accept responsibility for any failure by me to supply all the relevant records and information to you. You are not to complete an audit, nor do I wish you to undertake a detailed review of my affairs in order to substantiate the accuracy of my information. I understand that your work cannot be relied on to detect error and fraud. You are hereby authorised to link me as a client with the Inland Revenue Department and the Accident Compensation Corporation, and to communicate with the appropriate Bankers, Solicitors, Finance Companies and other persons or organisations to obtain such further information as you may require in order to carry out the above assignments.

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Client Signature

.....  
Date