

Financial Statements - 2021 Individual Questionnaire



Ensure this questionnaire is completed and included with your records.

Neovia Ref:

Client Name:			
Balance Date:		Phone:	
Email:		Cellphone:	
Physical Address:			
Postal Address:			

To: Neovia Advisory Limited.

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 to carry out the preparation of my/our financial statements and tax returns.

I/We authorise you to act as my/our Agent for Inland Revenue Department matters, and to obtain information from Inland Revenue about all tax types. This includes information through all Inland Revenue media and communication channels.

Signature _____

Date _____

Records Required (For 12 months to Balance Date)		Comments
Interest Received		
An RWT Deduction Certificate (IR15) will be sent to you by your bank or other financial institutions, indicating the amount of tax deducted from interest received. We require these for joint accounts also.	<input type="checkbox"/>	
Dividends Received		
A dividend payment advise will accompany dividend cheques indicating withholding tax deductions or imputation credits.	<input type="checkbox"/>	
Other Income & Expenses		
Self Employed Income Please complete Business Questionnaire.	<input type="checkbox"/>	
Rents Received Please complete Rental Questionnaire.	<input type="checkbox"/>	
Partnerships Income from Partnerships/Trusts/Estates/Other Companies, where accounts are prepared by another accountant.	<input type="checkbox"/>	
Overseas Investments Details of all foreign investments and income.	<input type="checkbox"/>	
Income Protection Insurance Please supply details of Income Protection Insurance paid during the financial year.	<input type="checkbox"/>	

Donations

Attach all receipts for donations to schools, churches, charitable organisations. Minimum donation is \$5.

\$ _____ Total

\$ _____ Total

Working for Families Tax Credits

Please supply full names and birth dates of all children. Note the following:

- If you had a child born within the current financial year you may be eligible for the Parental Tax Credit, please include a copy of the child's birth certificate or their IRD number if you already have one.
- Where a child became financially independent during the current financial year, please advise the date they left school.

Please provide details of any maintenance payments made or received during the year.

Child's Name

Date of Birth

IRD Number

Date Left School

Child's Name	Date of Birth	IRD Number	Date Left School

Other Information

Details of anything else we should be aware of in relation to the preparation of your accounts.

**Thank you for completing this questionnaire
Don't forget to sign it on page 1.**

