



(2) 2011 Personal Tax Questionnaire

for the income tax year starting 1 April 2010 to 31 March 2011

Please ensure you sign and return this questionnaire with all relevant information. Please mark the ENCLOSED box to confirm information is enclosed. If question is not applicable please mark the N/A box.

NOTE: Incomplete information will result in a delay in starting your accounts and may increase costs to you.

NAME

A RESIDENCY

ENCLOSED N/A

1 ARE YOU A NEW OR RETURNING NZ RESIDENT?

Please provide us with your departure/arrival details from/to NZ

.....

2 HAVE YOU LEFT NZ PERMANENTLY OR FOR AN EXTENDED PERIOD?

Please provide us with your departure details from NZ

.....

Have you completed any IRD Tax Residency Questionnaire? If so please provide copy

PLEASE CONTACT US IMMEDIATELY IF YOU ARE PLANNING TO LEAVE NZ FOR AN EXTENDED PERIOD

3 ARE YOU A SETTLOR / TRUSTEE / BENEFICIARY OF ANY OVERSEAS TRUSTS / ESTATES?

Please provide details of the Trust/Estate

B NEW ZEALAND INCOME

ENCLOSED N/A

4 EMPLOYMENT INCOME

Income with PAYE/Withholding Tax Deducted

\$

Redundancy Payment Received

\$

(Please attach letter from employer)

Redundancy Tax Credit Claimed

\$

5 INTEREST RECEIVED

Please provide Resident Withholding Tax Certificates

\$

6 DIVIDENDS RECEIVED

Please provide Dividend Statements (including Power Company Dividend)

\$

7 PORTFOLIO INVESTMENT ENTITY (PIE) INCOME

Please provide PIE Statements

\$

8 TRUST/ESTATE INCOME

Please provide trust/estate name and details

\$

9 RENTAL INCOME

Please complete separate Property Investment Questionnaire

\$

10 PARTNERSHIP/BUSINESS INCOME

Please complete separate Business Questionnaire

\$

11 SHAREHOLDER SALARY/LAQC LOSSES

Please advise name of companies & provide copy of financial statements

\$

12 OTHER NZ INCOME

Please provide details (e.g. Employee Share Options,
Government Stock, Share Trading etc)

\$

C OVERSEAS INCOME

ENCLOSED N/A

13 OVERSEAS SALARY/CONSULTANCY FEES

Please provide details

\$

14 OVERSEAS RENTAL INCOME

Please complete separate Property Investment Questionnaire

\$

15 OVERSEAS INTEREST RECEIVED

Please provide Interest Certificates

\$

16 OVERSEAS DIVIDENDS RECEIVED

Please provide Dividend Statements

\$

17 OVERSEAS PENSION PAYMENTS RECEIVED

Please provide details of payments

\$

18 OVERSEAS SHARES / SUPERANNUATION / LIFE INSURANCE POLICIES

Please provide details including:

\$

Cost of Investments (Including Premiums and Other Contributions)

Purchase/Contribution and Sale/Distribution details

Market Values as at 01/04/2010 and 31/03/2011

Investment Advisor reports and their contact details

D EXPENSES

ENCLOSED N/A

19 INCOME PROTECTION AND DISABILITY POLICIES

Please provide invoice/year end tax statement

\$

(Note "agreed value" policies are not deductible)

.....

20 MANAGEMENT FEES ON SHARE PORTFOLIO

Please provide invoices

\$

.....

21 INTEREST PAID IN RELATION TO INVESTMENTS

Please provide interest summaries

\$

.....

E TAX REBATES/FAMILY ASSISTANCE

ENCLOSED N/A

22 CHARITABLE DONATIONS / STATE SCHOOL FEES

Please provide original receipts

\$

.....

23 HOUSEKEEPER/CHILDCARE REBATE

Please provide original receipts

\$

.....

24 FAMILY ASSISTANCE

Have you received any family assistance payments this year

Y

N

*(This includes Working for Family Tax Credits and Independent Earner Credits)***F OTHER INFORMATION**

ENCLOSED N/A

25 STUDENT LOAN

Please provide details of any voluntary payments

\$

.....

Would you like overpayments refunded or applied to the loan?

.....

26 SPECIAL TAX CODE (STC) (IR23B)

Would you like us to prepare a special tax code for you?

Y

N

*(If you are expecting losses for the following year or you have losses brought forward, you can apply for a special tax code. This improves cashflow throughout the year instead of receiving one refund at year end.**Our fee to prepare the STC application is \$195 + GST)*

G HOW WOULD YOU LIKE YOUR TAX REFUNDS

Refund by cheque

Direct Credit to nominated bank account as follows

Transfer to offset other tax or future tax payable

Transfer to other related party

Offset against outstanding accounting fees

H HOW WOULD YOU LIKE TO RECEIVE YOUR COMPLETED DOCUMENTS

Collect documents from Withers Tsang office

Collect documents and meet with accountant/partner to review the results

Courier to home/office address

Post to home/office address

Email and post copies to home/office address

(Please note we cannot be held responsible for any loss of documents sent via courier or post and a courier (Signature Required) must be used if package is too big for standard NZ postal delivery)

Signature

Date

Email

Phone

Postal Address

List all Entities Names

(PLEASE REMEMBER TO COMPLETE THE TERMS OF ENGAGEMENT)