

PERSONAL ANNUAL QUESTIONNAIRE

Annual questionnaires are incredibly important because they provide us with the essential information we need to complete your financial accounts and ensure that all your tax obligations are met. Through them we are also able to gain a better understanding of your financial affairs and insight into how this could be improved.

Please take the time to complete the questionnaire(s) that apply to you. You may be required to complete more than one type of questionnaire depending on the entities that are applicable to you.

If you are unsure of the questionnaire that applies to you, or how many questionnaires you are required to complete, please contact us on 09 309 7851.

The completed questionnaire(s) and any supporting information should be:

Posted to: PO Box 113150, Newmarket, Auckland 1149



Name:

Year Ended: 31 March 2016

- | | Yes? | Information to send : |
|---|--------------------------|---|
| 1. Are you under 16 years old?
(Note: This is to assess the tax treatment of any trust distributions) | <input type="checkbox"/> | Date of birth |
| 2. Did you receive interest or dividends? | <input type="checkbox"/> | End of year interest statements
Dividend statements |
| 3. Are you a shareholder or a director of a company that Bellingham Wallace does not act for? | <input type="checkbox"/> | Name and contact details for the accountant preparing financial statements for each other company |
| 4. Do you receive income from an Estate, Trust, Partnership or Business that Bellingham Wallace does not act for? | <input type="checkbox"/> | Name and contact details for the accountant preparing financial statements for each other entity |
| 5. Do you receive rental income? | <input type="checkbox"/> | Refer to bellinghamwallace.co.nz to complete a rental income questionnaire |
| 6. Do you have a student loan?
(Note: You may have a repayment obligation) | <input type="checkbox"/> | |
| 7. Do you receive income from overseas (e.g. interest or dividends)? | <input type="checkbox"/> | End of year interest statements
Dividend statements
Other investment broker statements |
| 8. Do you have any overseas investments? | <input type="checkbox"/> | Please complete table A below |
| 9. Do you use the services of a portfolio advisor? | <input type="checkbox"/> | Portfolio advisor statement |
| 10. Do you receive any of the following types of income?

<div style="margin-left: 20px;"> Sale of land and buildings
 Sale of shares, bonds or other investments
 Overseas pension, annuity or superannuation scheme
 Any other income (e.g. royalties)
 Employee share option program
 Share options </div> | <input type="checkbox"/> | Details and documentation for any other income received |
| 11. Did you incur any expenses relating to earning your income, for example, income protection insurance or interest on loans used to purchase investments? | <input type="checkbox"/> | Confirmation of any premiums paid for income protection insurance
Details and invoices for other expenses |
| 12. Did you make any donations during the year? | <input type="checkbox"/> | Donation receipts |
| 13. Is your taxable income likely to be under \$9,880 for the year? | <input type="checkbox"/> | Please complete table B below |
| 14. Do you want us to assess your eligibility for working for families (family assistance)? | <input type="checkbox"/> | Please complete table C below |
| 15. Declaration
I accept responsibility for all records and information supplied to you for the purpose of preparing my Income Tax Return. I accept responsibility for any failure by me to supply all relevant records and information to you. | | |

Signature : _____

