

mackay
bailey
butchard



Chartered Accountants and
Business Development
Advisors

Mackay Bailey Butchard Ltd
Level 4, 262 Oxford Terrace
P O Box 13311
Christchurch 8141
New Zealand

P 03 365 0129
F 03 379 3685
e mbteam@mbb.co.nz

w www.mbb.co.nz

INFORMATION QUESTIONNAIRE FOR NON-RESIDENT INDIVIDUAL RETURN OF INCOME FOR 2009 INCOME TAX YEAR

NAME:

Balance Date:

Have your contact details changed?

Phone:

Fax:

Mobile:

E-mail:

Postal address:

Bank Account Number:

Bank

Branch

Account Number

Suffix

Please take the time to work through this questionnaire thoroughly and action each point that is applicable to you.
This will greatly assist us in the efficient preparation of your financial statements.

CHARTERED
ACCOUNTANTS



Directors
Geoffrey Bailey
Tania King
James Nell
Michael Woodward
Consultant
John Butchard
Associate
David Kennedy



TERMS OF ENGAGEMENT

I accept responsibility for the accuracy and completeness of the information supplied below which is to be used in the preparation of my income tax return.

I also accept responsibility for all other records and information supplied to you other than those listed above. I accept responsibility for any failure by me to supply all relevant records and information to you.

(The above statement is required by the New Zealand Institute of Chartered Accountants. Accounting Standard: "Compilation of Financial Information" (SES-2)).

I, the undersigned, authorise my accountants, Mackay Bailey Butchard Limited, to act on my behalf in dealings with the Inland Revenue Department on all tax types and activities.

I, the undersigned, authorise Mackay Bailey Butchard Limited to communicate with the appropriate bankers, solicitors, finance companies and other persons and organisations to obtain such further information as they may require to carry out the terms of engagement.

(Due to the Privacy Act 1993 and the Tax Administration Act 1994 we require your written authorisation for us to discuss any tax matters with the Inland Revenue Department.)

Signature: _____

Full Name: _____

Date Completed: _____

INCOME

Income from the following sources will be supplied directly to us by the Inland Revenue Department:

Wages	New Zealand Superannuation
Salary	Accident Compensation Payments Taxable
Directors Fees	Taxable New Zealand Income Support Benefits
Veterans Pension	Family Support and Workplace Insurance
Information	
Withholding Payments	

Expenses incurred in earning withholding income can be claimed (where they have not been reimbursed). Please provide full details.

INTEREST AND DIVIDENDS (New Zealand only)

Please supply us with all dividend and interest advice slips, including joint investments.

Please provide full details of source and amount received. Dividend, interest and bonus issue advice slips are required to show interest withholding tax paid on your behalf and imputation tax credits available to you.



Did you have any New Zealand royalties paid or credited to you? Include any royalties from partnerships and trusts.

Yes / No

If yes,

Name of payer

Withholding Tax

Gross Royalties

STUDENT LOANS

Did you receive a Student Loan during the year?

Yes / No

OTHER INCOME

Rents Received - please ask us for a Rental Questionnaire if one has not been sent to you.

Partnership, Trusts or Estates

If you have received income from a New Zealand Partnership, Trust or Estate, please supply details and advice notes received. If the financial statements are **not** being prepared by us alternatively advise us of the other Accountant's name and phone number.

Name of Entity: _____

Gross Taxable Interest Income: \$ _____ Tax Paid: \$ _____

Gross Dividends: \$ _____ Tax Paid: \$ _____

Other Income: \$ _____ Tax Paid: \$ _____

Are you claiming a loss from a Loss Attributing Qualifying Company? Yes / No \$ _____

Other (please supply details)

Shares or Debentures in a New Zealand Co-operative Society.

Sundry - taxable allowance, cash jobs, tips or any other income sourced within New Zealand.

Details of Income or Loss in any special Partnership based in New Zealand.



EXPENSES

Are you able to claim for any expenses paid during the year?

Yes / No

If yes, attach details.

The only expenses you can claim are:

- § A fee to someone for completing your tax return.
- § Commission on interest or dividend income (but not bank fees – they are a private expense).
- § Expenses incurred in earning income from which withholding tax has been deducted (IR13 income).
- § Additional expenses incurred in deriving partnership income, for example, interest on capital borrowed to purchase shares in the partnership.
- § Interest on money you borrowed to buy shares or to invest – as long as the investment will produce some taxable income.
- § Premiums on loss of earnings insurance provided the benefit from the insurance policy is taxable income.

Did you work in New Zealand at any time from 1 April 2008 to 31 March 2009?

Yes / No

If yes:

Amount of income received from this work

\$ _____

Number of weeks and days you worked in New Zealand to earn this income

_____ weeks _____ days

The dates you arrived in, and left New Zealand:

Period from: to
Day Month Year Day Month Year

The number of weeks you worked more than 20 hours in New Zealand _____ weeks

Thank you for completing this questionnaire. Please don't forget to sign where indicated on page 2