

JOLLY DUNCAN & WELLS LIMITED
PERSONAL/RENTAL INFORMATION QUESTIONNAIRE
YEAR ENDED

First Floor
 127 Main Highway
 Ellerslie, Auckland 1051

PO Box 11053
 Ellerslie
 Auckland 1542

Phone: 579 7096
 Email: results@jdw.co.nz
www.jdw.co.nz

NAME:	_____
ADDRESS:	_____
EMAIL:	_____
TELEPHONE:	
Business:	_____
Private:	_____
Mobile:	_____

Please answer all questions on the Questionnaire and provide all information requested when you send us your accounting records. This will ensure that your returns are prepared by us as quickly as possible. If a question does not apply to your situation, mark N/A on the question.

INCOME FROM WHICH TAX WAS DEDUCTED

Supply the following (if appropriate)

- **Summary of Earnings Form (IR544)** (if sent to you by IRD): Salary or Wages, Student Allowance, Income tested benefit, ACC payments, NZ Superannuation, other pensions, Annuities or Superannuation, Shareholder Employee Salary.
 - **Schedular payments** (contractors with Withholding Tax deducted)
- Note: If you are an existing tax client, the IRD will electronically send to us your Summary of Earnings and Schedular Payments.**
- **Family Tax Credits** paid by Work & Income NZ (WINZ)
 - **NZ Interest** – Resident Withholding Tax Deduction Certificates (IR15)
 - **NZ Dividends** - All dividend certificates for the year
 - **Overseas Income Certificates**

RENTAL INCOME

Yes/No

Location of Rental Property: _____

Construction: Wood Brick Reinforced Concrete Block

Number of months during the year that the property was available to be rented: _____

Gross Rent Received	\$
Other Income Received (eg. Insurance claim received)	\$
Rental Expenses	
Rental Advertising (including Trade Me)	\$
Rental Agency Fees	\$
Property Body Corporate Fees	\$
Property Insurance	\$
Interest on Mortgage	\$
Lawns and Gardening	\$
Motor Vehicle (rental inspections, rent collection or R & M)	kms
Rates	\$
Repairs and Maintenance (Invoices required for amounts over \$500)	\$
Other (eg the purchase of assets during the year over \$500 (GST excl.))	\$
Other (eg paid an excess for an Insurance claim)	\$
Other	\$

Documentation Required

- 1) If property was purchased or sold during the year, supply solicitor’s statement showing details of Sale and Purchase Agreement and Valuation Report.
- 2) Agents Summary
- 3) Mortgage Statements
- 4) Do you occupy part of the Rental Property? Yes/No Percentage of property occupied _____

OTHER INCOME

Yes/No

List source, amount of income and any tax paid on this income.

<i>SOURCE</i>	<i>Income</i>	<i>Amount of tax paid</i>
Estate or Trust Income: _____	\$ _____	\$ _____
Partnerships: _____	\$ _____	\$ _____
Self Employed Income: _____	\$ _____	\$ _____
Shareholder Employee Salary: _____	\$ _____	\$ _____
Directors Fees: _____		
Royalties: _____		
Share Options: _____		
Employee Share Options: _____		

Sale or disposal of Assets:

Income from the sale of land/or buildings. \$ _____

The profits are taxable if you bought a property for the purpose of reselling it or are in the business of buying and selling land and/or buildings.

Property Sold: _____

Overseas Income:

	Country	Cost	Market Value
Interest: _____		\$ _____	\$ _____
FIF Income: _____		\$ _____	\$ _____
Dividends: _____		\$ _____	\$ _____
Investments: _____		\$ _____	\$ _____
Overseas pension annuity: _____		\$ _____	\$ _____
Overseas Superannuation Scheme: _____		\$ _____	\$ _____

Please provide a summary of all overseas investments held, showing date purchased and cost of investment.

EXPENSES & DEDUCTIONS

Income Protection Insurance: _____ \$ _____
Interest on Loans used to purchase investments: _____

LOSSES

Attributed LAQC Losses \$ _____
Limited Partnership \$ _____

REBATES

Rebates for donations, housekeeper and childcare payments are now claimed on a separate rebate claim form IR526. Send us your details and we will complete this for you.

If you completed one yourself last year, the IRD will send you a form for 2010. Some payments to schools will be donations.

FINANCIAL ARRANGEMENTS

Financial arrangements include government stocks, future contracts and deferred property settlements. Please advise if there has been a sale or maturity of a financial arrangement.

WORKING FOR FAMILIES TAX CREDITS

If you have children you may qualify for Working for Families Tax Credits. Information is available on the following website www.workingforfamilies.govt.nz

Do you want us to assess your eligibility for working for families tax credits **Yes/No**

If yes please complete the table below:

Working for Families:

	Name	IRD Number	Date of Birth
Spouse/Partner			
Child 1			
Child 2			
Child 3			
Child 4			

Spouse/Partner taxable income \$ _____

OTHER INFORMATION REQUIRED

Do any of the following apply? If yes, provide details

- ACC: Please provide your "Business Description"
- Student Loans

Declaration

I accept responsibility for all records and information supplied to you for the purpose of preparing my Income Tax Return and Financial Statements. I accept responsibility for any failure by me to supply all relevant records and information to you.

Signature: _____