



PERSONAL QUESTIONNAIRE

FOR THE YEAR TO 31 MARCH _____

If we require any further information we will contact you.

NAME	
BANK ACCOUNT NUMBER (For Tax Refunds)	

DONATIONS

Please attach receipts for any Donations, including voluntary school fees.

WORKING FOR FAMILIES

Did you receive, or think you were you entitled to receive, Working for Families?

INTEREST AND DIVIDENDS

Please attach Bank RWT Certificates and Dividend Statements for any interest or dividends received.

TRUST, ESTATE OR COMPANY INCOME

Please attach details of any Income or Losses you received from any Trust, Estate, Company, or Partnerships that we do not prepare Tax Returns for.

SELF EMPLOYMENT AND RENTAL

If you received Self-Employment Income or Rent in your personal name, please complete our Business and/or Rental Questionnaire.

OTHER INCOME

Please attach details of any other income not covered above.

EXPENSES

Please attach details of any expenses you can claim in your Personal Tax Return i.e. Income Protection Insurance.

PLEASE ENSURE OUR TERMS OF ENGAGEMENT FORM HAS BEEN COMPLETED

