

31 March 2015

Individual Questionnaire

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|----|---|--|--|
| 1 | Did you receive interest or dividends? | <div style="display: flex; justify-content: space-around; font-size: small;"> No Yes </div> <div style="display: flex; justify-content: space-around;"> <input style="width: 40px; height: 20px; border: 1px solid black;" type="checkbox"/> <input style="width: 40px; height: 20px; border: 1px solid black;" type="checkbox"/> </div> | End of year interest/ Dividends statements/
PIE income details |
| 2 | Are you a shareholder or director of a company that we do not act for? | <div style="display: flex; justify-content: space-around; font-size: small;"> No Yes </div> <div style="display: flex; justify-content: space-around;"> <input style="width: 40px; height: 20px; border: 1px solid black;" type="checkbox"/> <input style="width: 40px; height: 20px; border: 1px solid black;" type="checkbox"/> </div> | Name and contact details for the accountant preparing the financial statements |
| 3 | Do you receive income from an Estate, Trust, Partnership or Business that we do not act for? | <div style="display: flex; justify-content: space-around; font-size: small;"> No Yes </div> <div style="display: flex; justify-content: space-around;"> <input style="width: 40px; height: 20px; border: 1px solid black;" type="checkbox"/> <input style="width: 40px; height: 20px; border: 1px solid black;" type="checkbox"/> </div> | Name and contact details for the accountant preparing the financial statements |
| 4 | Do you receive rental income? | <div style="display: flex; justify-content: space-around; font-size: small;"> No Yes </div> <div style="display: flex; justify-content: space-around;"> <input style="width: 40px; height: 20px; border: 1px solid black;" type="checkbox"/> <input style="width: 40px; height: 20px; border: 1px solid black;" type="checkbox"/> </div> | Complete a Rental Supplement |
| 5 | Do you have a student loan? | <div style="display: flex; justify-content: space-around; font-size: small;"> No Yes </div> <div style="display: flex; justify-content: space-around;"> <input style="width: 40px; height: 20px; border: 1px solid black;" type="checkbox"/> <input style="width: 40px; height: 20px; border: 1px solid black;" type="checkbox"/> </div> | |
| 6 | Do you use the services of a portfolio advisor? | <div style="display: flex; justify-content: space-around; font-size: small;"> No Yes </div> <div style="display: flex; justify-content: space-around;"> <input style="width: 40px; height: 20px; border: 1px solid black;" type="checkbox"/> <input style="width: 40px; height: 20px; border: 1px solid black;" type="checkbox"/> </div> | Portfolio advisor annual statements |
| 7 | Do you have any overseas investments not covered in 6? (Shares, foreign Superannuation funds, overseas unit trusts, life insurance policies or pension funds) | <div style="display: flex; justify-content: space-around; font-size: small;"> No Yes </div> <div style="display: flex; justify-content: space-around;"> <input style="width: 40px; height: 20px; border: 1px solid black;" type="checkbox"/> <input style="width: 40px; height: 20px; border: 1px solid black;" type="checkbox"/> </div> | Provide details of Investment name, country of origin type of investment, cost price and market value at 31 March 2015. Details of any sales/purchases for the year. Investment Broker statements. |
| 8 | Did you receive any other overseas income? (Interest, dividends, salary or wages, self employment) | <div style="display: flex; justify-content: space-around; font-size: small;"> No Yes </div> <div style="display: flex; justify-content: space-around;"> <input style="width: 40px; height: 20px; border: 1px solid black;" type="checkbox"/> <input style="width: 40px; height: 20px; border: 1px solid black;" type="checkbox"/> </div> | End of year interest and/or dividend statements
Details and documnetation for nay other income received. |
| 9 | Did you received any income from the following sources?
Sale of land and buildings
Sale of NZ shares, bonds or other investments
Any other income (e.g. Royalties) | <div style="display: flex; justify-content: space-around; font-size: small;"> No Yes </div> <div style="display: flex; justify-content: space-around;"> <input style="width: 40px; height: 20px; border: 1px solid black;" type="checkbox"/> <input style="width: 40px; height: 20px; border: 1px solid black;" type="checkbox"/> </div> | Details and documentation for any other income received |
| 10 | 10. Did you incur any expenses relating to earning your income? | <div style="display: flex; justify-content: space-around; font-size: small;"> No Yes </div> <div style="display: flex; justify-content: space-around;"> <input style="width: 40px; height: 20px; border: 1px solid black;" type="checkbox"/> <input style="width: 40px; height: 20px; border: 1px solid black;" type="checkbox"/> </div> | Confirmation of any premiums paid for income protection insurance. Details and invoices for other expenses, including interest paid. |
| 11 | Did you make any donations during the year? | <div style="display: flex; justify-content: space-around; font-size: small;"> No Yes </div> <div style="display: flex; justify-content: space-around;"> <input style="width: 40px; height: 20px; border: 1px solid black;" type="checkbox"/> <input style="width: 40px; height: 20px; border: 1px solid black;" type="checkbox"/> </div> | Donation receipts/ School Donations |

12 Any other relevent information that may be helpful to us

13 Name
