

New Client Information

MARRYATT



Personal Information:

Name _____

Do you use any other names? _____

IRD Number _____ Date of birth _____

Home address _____

Home phone _____ Work phone _____

Mobile phone _____ Best times and number to call: WK HM MB _____

Email address _____

Bank account details – Tax refunds are direct credited by the IRD

Bank _____ Branch _____ Account # _____

Partner/spouse's name _____

(If your spouse, partner or child is a shareholder in your business, then they will need to fill out a form also.)

Children's names, date of birth, IRD numbers; [Dependent children & beneficiaries of trusts (if applicable)]

_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Are you the principal caregiver? Yes / No

Income Information:

Where do you source your income from? Please tick () all those that apply to you.

Rentals Salary/wages Income with withholding tax deducted (EG commission payments)

ACC Family Support Investments – New Zealand Investments – Foreign

Any foreign income at all – insurance, super, etc _____

Working For Families Tax Credits NZ Superannuation WINZ benefits Private Superannuation

Income from:

Privately owned company Partnership Sole trader Family Trust Trading Trust

Any other income? _____

Please list all businesses, trusts, companies or other entities that you own or have an interest in.

Are you behind in any tax returns or tax payments? No / Yes _____

Why do you want to engage an accountant?

To minimise my tax To maximise my income To catch up with arrears Compliance

For Financial Planning To protect my assets Other _____

Are you registered for GST? Yes / No Do you need us to do your GST returns? Yes / No

What accounting system do you use?

Computer programme (name) _____ Manual cashbook None

How financially savvy are you? Very / Quite / Moderate / Beginner

Which areas do you think you need the most help with? _____

Is there anything else you'd like us to know?

How did you hear about us? _____

Who was your previous accountant? _____