

Business details

Company/trust/business name

Company/trust/business IRD number

Individual 1 name

Individual 1 IRD number

Individual 2 name *(if applicable)*

Individual 2 IRD number *(if applicable)*

Contact details

Address

Email

Phone



Business Questionnaire

Income

Please provide bank statements or a cashbook detailing all business and investment income for the year. This should include any RWT Certificates, Dividend Statements, and details of any income or losses from other entities. If you're using an accounting system, we will need access to it.

Attached:
yes / no

Expenses

Please provide bank statements or a cashbook detailing all business expenses for the year. Please ensure details are provided for any entertainment (food, alcohol etc.), repairs and maintenance, and legal fees.

Attached:
yes / no

Loan and hire purchases

Please provide Loan Statements and/or Hire Purchase Schedules for any loans or hire purchases used to finance or operate the business.

Attached:
yes / no

Accounts receivable and payable

Please provide a list of amounts owing to you as at 31 March. Please provide a list of amounts you owe to others as at 31 March.

Attached:
yes / no

Fixed assets

If assets were purchased, sold, or scrapped during the year please provide:

- Date purchased, sold, or scrapped
- Whether new or second hand
- Description
- GST exclusive price purchased or sold for
- Details of any Trade-ins

Attached:
yes / no

Vehicles

Please provide the private use percentage of any vehicles used in the business.

Attached:
yes / no

Home office expense claim

If you use part of your house as a home office, please provide the following for the year ended 31 March:

- Size of office and house;
- Amounts paid for household expenditure such as Home and Contents Insurance, Rates, Mortgage Interest, Electricity, Phone Line Rental, Rent etc.

Attached:
yes / no



Business Questionnaire

Inventory and work in progress

Please provide a list and value of trading stock as at 31 March (must be valued at the lower of cost or market value (do not include GST). Do you have goods that you sell that are currently in the process of being "built", but not yet finished at 31 March?

Attached:
yes / no

Trust, companies and partnerships

Please provide details if there have been any changes in the ownership structure i.e. new Trustees, Partners, or Shareholding changes.

Attached:
yes / no

Please provide all gifting statements if the Entity is a Trust.

DECLARATION:

I/WE

- Have read, understood, and agree to abide by the Terms of Agreement;
- Authorise any person or company, under the Privacy Act 1993, to provide Simple Accounting Services Limited (SAS) with any information required in providing the services;
- Undertake to pay accounts as they fall due;
- Agree all unpaid accounts will incur collection/legal fees (as between solicitor and client).
- Give authority for SAS to:
 - Act on my behalf with IRD for all tax types until further notice as my Tax Agent, and to link my tax records to SAS's Tax Agency for all tax types.
 - Obtain any information from IRD relating to your tax affairs which includes accessing information via IRD's online website services, and to become the mailing address for any correspondence from IRD. The communication above will be by various means, including telephone, internet, facsimile, email, and other correspondence.
 - Sign any IRD correspondence on my behalf, which includes any IRD returns. Although SAS may prepare IRD returns on my behalf, I acknowledge that this does not absolve me of the responsibility for ensuring any IRD returns filed are true and correct, and meeting any other IRD obligations.

Individual 1

Full name

Signature

Date

Individual 2 (if applicable)

Full name

Signature

Date
