

# 2018 WORKING FOR FAMILIES QUESTIONNAIRE

Financial year ended 31 March 2018

Client Name: \_\_\_\_\_

## To BHW Ltd

I hereby instruct you to prepare my financial accounts and taxation returns for the year/period ending \_\_\_\_\_.  
I undertake to supply all information necessary to carry out such services, and will be responsible for the accuracy and completeness of information provided.

You are hereby authorised to communicate with my Bankers, Solicitors, and Finance Companies and all government agencies to obtain such further information as you may require in order to carry out the above assignment. Our existing Terms of Engagement with BHW Ltd are accepted as applying to this and future assignments until we agree otherwise.

Client's signature \_\_\_\_\_ Dated: \_\_\_\_\_

### Checklist of Records Required:

*(a detailed explanation of the requirements for each of these items is provided over leaf)*

### Enclosed

✓ or NA

1. Children's Details

2. Tax Credit and Parental Tax Credit

3. Other Income

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Financial year ended 31 March 2018

**Please check the list below to ensure you have provided all the applicable information and return this completed questionnaire with your records. Incomplete information may cause delays in completing your return.**

## 1. Children's Details

- Please supply full names and birth dates of all children

Child's Name	IRD No.	Date of Birth	Date left School
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

## 2. Tax Credits and Parental Tax Credit

- If you have received Working for Families Tax Credits during the year, please supply the certificate issued to you by IRD, detailing the amounts
- Also provide details of any child support or maintenance payments made or received
- If we do not prepare your spouse or partner's taxation return, please provide us with details of their income.

## 3. Other Income

- From 1 April 2015 income from the following sources may also be required to be included when calculating your family income:
  - Attributable trustee income
  - Attributable fringe benefits
  - PIE income
  - Passive income of children
  - Income of non-resident spouse
  - Tax exempt salary or wages
  - Pensions and annuities
  - Other payments from any other person that is used for the family's day to day living expenses
  - Income equalization scheme deposits
- Please provide details of any of the above income you have received if you have not already done so.

# 2018 WORKING FOR FAMILIES QUESTIONNAIRE

Financial year ended 31 March 2018

## 4. Other Comments

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## Confirmation of Contact Details

Postal Address: \_\_\_\_\_

Email Address: \_\_\_\_\_

Contact Number(s): \_\_\_\_\_

## Bank Account Details (Required for IRD Refunds)

Bank Account Name: \_\_\_\_\_

Bank Account Number: \_\_\_\_\_

**THANK YOU**

Please make sure all the checklist boxes are complete, you have signed the front page and you have enclosed the records required.