



PKF

PKF Francis Aickin Limited
Chartered accountants and business advisers

Passion

Teamwork

Clarity

Quality

Integrity

Client Name: _____

	Name	IRD Number	Date of Birth
Child 1			
Child 2			
Child 3			
Child 4			
Child 5			

Do any of the following apply, if so please provide details:

TICK

- | | | | |
|---|-----|------------|---------------------------------|
| 1. Do you have a spouse / partner for whom we do not prepare accounts for? | Yes | No/
N/A | Already
provided/
in Xero |
| 2. Did you or your partner receive any child support / family assistance payments during the period? | Yes | No/
N/A | Already
provided/
in Xero |
| 3. Has there been any change in family circumstances e.g. married, separated? | Yes | No/
N/A | Already
provided/
in Xero |
| 4. Did you share custody of your child(ren) with anyone other than your partner? | Yes | No/
N/A | Already
provided/
in Xero |
| 5. Did you or your partner pay or receive maintenance to / from another person during the year? | Yes | No/
N/A | Already
provided/
in Xero |
| 6. For any week during the year did you work 20 hours or more if single, or combined with your spouse / partner 30 hours or more? | Yes | No/
N/A | Already
provided/
in Xero |
| 7. Are you or your partner a settlor of an income earning trust, for which we do not act? | Yes | No/
N/A | Already
provided/
in Xero |
| 8. Are you or your partner a shareholder in a close company for which we do not act? | Yes | No/
N/A | Already
provided/
in Xero |
| 9. Did you or your partner receive any attributable Fringe Benefits as a shareholder employee from a company for which we do not prepare the accounts? | Yes | No/
N/A | Already
provided/
in Xero |
| 10. Did you or your partner's company / trust make an Income Equalisation Scheme deposit? | Yes | No/
N/A | Already
provided/
in Xero |
| 11. Did you or your partner receive any annuity from a life insurance policy or pension from a superannuation fund (excluding NZ Super) during the period? | Yes | No/
N/A | Already
provided/
in Xero |
| 12. Did you or your partner receive any other payments whose total amount for the period exceeds \$5,000 that were used to meet the family's day to day expenses? | Yes | No/
N/A | Already
provided/
in Xero |
| 13. Did your child(ren) receive any income totalling more than \$500 from interest, dividends, PIE distributions, Trust distributions, or any other passive income? | Yes | No/
N/A | Already
provided/
in Xero |