

Individual Income Tax Information Questionnaire

Terms of Engagement

Client Name:

Contact Numbers:

E-mail:

Financial Year Ended: 31 March 2017

We appreciate the opportunity to work with you and this Agreement confirms the terms of our appointment to provide accounting and tax advice, including compilation of financial statements (if required), annual income tax return and payment of tax for you and your related entities, if any.

The attached Information Questionnaire must be completed as a requirement of the Chartered Accountants Australia and New Zealand and is used by us to obtain all relevant information and to assist us to prepare the Financial Statements and Tax Return(s). It is your responsibility to ensure the accuracy and completeness of the information as well as checking the final Returns for reasonableness and correctness.

It is important to understand that it is not our responsibility to detect error or fraud and that our work has been undertaken only for you. We are not responsible for any loss or claim by any third party.

Our fees are based on the time involved and invoices issued are payable by the 20th of the month following the date of invoice. Although the invoice may not be addressed to you personally this agreement confirms your acceptance of personal liability for the charges for work you have asked us to undertake.

Privacy Act restrictions mean that we cannot obtain information sometimes necessary to prepare your Financial Statements and Tax Return from your Bank or any other third party without your authority. If you do not wish us to have this authority please delete the following (authority granted).

You also give us authority to add you, and any associated entities (if required), to our tax agency list with Inland Revenue for all tax types. This enables us to obtain information as required from Inland Revenue by phone, fax, email or via the internet. It will also allow us to check assessments and statements.

The time checking assessments and statements and, if necessary, correcting IRD errors will be invoiced to you.

If you are in agreement with the terms of engagement as outlined above please sign below.

Yours sincerely

Signed: _____

Dated: _____

Information Required to Prepare your Income Tax Return

Tick Box

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1. Interest Withholding Tax Certificates ☐
These are supplied by your bank shortly after 31 March.
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2. Dividend PAYE and Imputation Credit Certificates - NZ shares ☐
(These are supplied when dividends are paid by a company.)
Including Notices' where dividends are reinvested.
-
3. Overseas Shares and Investments. All dividend advice notices including those where dividends have been reinvested. A list of all shares and investments owned at 1st April 2016 and 31st March 2017 including name of Company, # of Shares, type of shares and if possible approx cost, and details of all Shares bought and sold between 1st April 2016 and 31st March 2017. ☐
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4. Rental income ☐
Complete the attached schedule if you received rental income personally.
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5. Other income ☐
Attach details of income received from any other sources.
-
6. Income Protection Insurance ☐
Attach details if you had an Income Protection policy.
-
7. ACC Levies ☐
Attach ACC Levies invoices paid during the year if self employed.
-
8. Any other information you think may be relevant ☐
-
9. Did you receive income from a Partnership, Estate or Trust?
☐ YES ☐ NO

 If YES: (Cross out one)
- Name of Partnership/Estate/Trust: _____
- IRD Number: _____
- Amount of Income or Loss _____
- Details of any interest cost to invest in Partnership: _____
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10. Donations made
Attach receipts (there is now no dollar limit on donations made)
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