curtismclean
CHARTERED ACCOUNTANTS
ADDING VALUE BEYOND THE NUMBERS

Individual Income Tax Information Questionnaire

Terms of Engagement

Client Name: ______________________________

Contact Numbers: ______________________________

E-mail: ______________________________

Financial Year Ended: 31 March 2010

We appreciate the opportunity to work with you and this Agreement confirms the terms of our appointment to prepare Financial Statements and Tax Returns for you and your related entities, if any.

The attached Income Tax Information Questionnaire must be completed as a requirement of the New Zealand Institute of Chartered Accountants 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 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

Curtis McLean Limited
P O Box 2293
Wellington
Ph: 04 384 5609
Fax: 04 385 1067

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Signed

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Dated

Information Required to Prepare your Income Tax Return

Tick Box

1. Interest Withholding Tax Certificates ☐
These are supplied by your bank shortly after 31 March.

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 2009 and 31st March 2010 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 2009 and 2010. ☐

4. Rental income ☐
Complete the attached schedule if you received rental income personally.

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 ☐
Attach details.

9. Did you receive income from a Partnership, Estate or Trust? YES/NO (delete one)
If YES:

Name of Partnership/Estate/Trust: ________________________________

IRD Number: ________________________________

Amount of Income or Loss ________________________________

Details of any interest cost to invest in Partnership: ________________________________

10. Donations made ☐
Attach receipts (there is now no dollar limit on donations made)

11. Do you pay for childcare? YES/NO (delete one)
If YES:

Name of Childcare Provider: ________________________________

Address of Childcare Provider: ________________________________

Amount paid for childcare: $ _______________