



Client Name: _____

Financial Year: MM / YY Phone Number: _____

Address: _____

Email Address: _____

AUTHORITY & DECLARATION

I accept responsibility for the accuracy and completeness of all the information supplied and undertake to review the completed return and advise of any errors or omissions within 10 days. I agree that any liability that may arise to Brown & Associates Accounting Group Ltd will be limited to three times the fee charged for preparing the return.

I hereby authorise Brown & Associates Accounting Group Ltd to prepare a tax return and any necessary financial statements from the information I have supplied, and to sign the completed tax return as a true and correct return on my behalf as agent. I do not wish Brown & Associates Accounting Group Ltd to complete an audit or review.

I consent to Brown & Associates Accounting Group Ltd obtaining all necessary information from third parties, including the Inland Revenue Department (IRD), which includes the IRD online service. I also consent to the release of information from Brown & Associates Accounting Group Ltd to the institute of Chartered Accountants of New Zealand for the purpose of satisfying them that their professional standards are met.

I understand that payment of our invoice is due 20th of the following month of the date of our invoice, and late payment may be subject to interest, and Brown & Associates Accounting Group Ltd reserves the right to charge overdue fees on all accounts not paid by due date. Brown & Associates Accounting Group Ltd reserves the right to hold all information and files until all invoices are paid in full. I also personally guarantee the payment of all Brown & Associates Accounting Group Ltd invoices.

Signed:

Date:

INFORMATION REQUIRED

1.	Did you receive any income from which tax was deducted (ie: wages, salary, ACC, benefit or NZ Super If yes we will obtain these details from Inland Revenue.	YES/NO																						
2.	Did you buy or sell shares during the year? If yes, please provide full details.	YES/NO																						
3.	Please provide details of interest and dividends received. (other sheet if necessary)																							
	<table border="0" style="width: 100%;"> <tr> <td style="width: 40%;">Payer</td> <td style="width: 15%;">ImpCr</td> <td style="width: 15%;">RWT</td> <td style="width: 30%;">Gross</td> </tr> <tr> <td>.....</td> <td>.....</td> <td>.....</td> <td>.....</td> </tr> <tr> <td>.....</td> <td>.....</td> <td>.....</td> <td>.....</td> </tr> </table>	Payer	ImpCr	RWT	Gross											
Payer	ImpCr	RWT	Gross																					
.....																					
.....																					
4.	Were you a partner in a partnership, a shareholder or director in a private Company or did you receive any income that has not been taxed at source. If yes, please advise details.	YES/NO																						
5.	Family Assistance If you have children you may be entitled to Family Assistance, please advise us of any changes during the year (eg: baby born, child leaving school, separation, maintenance paid or received - you may need to contact IRD Child Support direct to obtain this). Please advise details of passive income child(ren) received over \$500 gross \$.....																							
6.	Donations Rebate If you made any charitable donations, please forward receipts for these together with a bank deposit slip for your rebate to be paid into.																							
7.	<u>Rental Income</u> Rental type (Circle one): Long Term Short Term If short term: Number of nights rented _____ Private use nights _____ Period Rented: From _____ To _____ Amount per Week: \$ _____ Total Rent Received for year \$ _____ <table border="0" style="width: 100%;"> <tr> <td style="width: 70%;"><u>Rental Expenses</u></td> <td style="width: 30%; text-align: right;"><u>Amount</u></td> </tr> <tr> <td>Bank Fees</td> <td style="text-align: right;">\$</td> </tr> <tr> <td>Insurance</td> <td style="text-align: right;">\$</td> </tr> <tr> <td>Interest</td> <td style="text-align: right;">\$</td> </tr> <tr> <td>Lawyer Fees</td> <td style="text-align: right;">\$</td> </tr> <tr> <td>Management Fees</td> <td style="text-align: right;">\$</td> </tr> <tr> <td>Rates/Water Rates</td> <td style="text-align: right;">\$</td> </tr> <tr> <td>Repairs & Maintenance</td> <td style="text-align: right;">\$</td> </tr> <tr> <td>Other</td> <td style="text-align: right;">\$</td> </tr> <tr> <td>.....</td> <td style="text-align: right;">\$</td> </tr> <tr> <td colspan="2">Travel for rental inspection Kms</td> </tr> </table>		<u>Rental Expenses</u>	<u>Amount</u>	Bank Fees	\$	Insurance	\$	Interest	\$	Lawyer Fees	\$	Management Fees	\$	Rates/Water Rates	\$	Repairs & Maintenance	\$	Other	\$	\$	Travel for rental inspection Kms	
<u>Rental Expenses</u>	<u>Amount</u>																							
Bank Fees	\$																							
Insurance	\$																							
Interest	\$																							
Lawyer Fees	\$																							
Management Fees	\$																							
Rates/Water Rates	\$																							
Repairs & Maintenance	\$																							
Other	\$																							
.....	\$																							
Travel for rental inspection Kms																								
8.	COVID19 Wage Subsidies Please provide details of any covid leave support payments claimed. Did you receive a covid leave support payment? YES/NO How much did you claim? \$																							