



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)

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. YES/NO

If yes, please advise details.

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. **Rental Income**

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 \$ _____

<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	