Client Questionnaire
Individual Income Tax Information

Terms of Engagement

Client Name ______________________________

Contact Number ______________________________

Email Address ______________________________

Financial Year End ______________________________

This Agreement, together with our Terms of Business as set out on our website (https://www.nexia.co.nz/wp-content/uploads/2023/09/Terms-of-Business-Nexia-Hawkes-Bay-Limited.pdf) confirms the terms of our appointment to provide accounting and tax advice, including the compilation of financial statements (if required), annual income tax return and compilation of financial information. If financial statements are compiled, these will be prepared in accordance with "Service Engagement Standard 2" as issued by Chartered Accountants Australia and New Zealand.

The enclosed Information Checklists is used by us to obtain all relevant information and to assist us to prepare the financial Statements (if required) 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. We will not audit, review or otherwise attempt to verify the accuracy or completeness of that information. Compilation services cannot be relied upon to detect fraud or error and our services are undertaken only for you. We are not responsible for any loss or claim by any third party.

We confirm that while we will provide assistance in meeting taxation obligations, including advice on payments and/or reminder letters for taxes due, the responsibility for paying the correct tax on time is your sole responsibility.

You give us authority to seek any additional information that we may require for the purposes of preparing your financial statements and tax return(s) from relevant third parties including (but not limited to) your solicitor, advisor, employees, bank or other financial institution and authorise said parties to supply us with such information.

You give us authority to add you, and any associated entities (if required), to our tax agency list with Inland Revenue for all tax types.

If you are in agreement with the terms of engagement as outlined above and the Terms of Business as set out on our website, please sign below.

Signed on behalf of ______________________________

Signature ______________________________

Date ______________________________

Nexia
New Zealand

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Checklist

1. **Interest Income**
   All resident withholding tax certificates for interest income received from within and outside New Zealand. ☐

2. **Dividend Income**
   All dividend notices including those where dividends have been reinvested, for dividend income received from within and outside New Zealand. ☐

3. **Overseas Income**
   For all overseas shares and investments, we require a list of all shares and investments owned. ☐

4. **Rental Income**
   Please complete the rental schedule questionnaire if you received rental income personally. ☐

5. **Other Income**
   Please include details of all income you have received from any other sources, including (but not limited to) income from the disposal of land, foreign pension schemes or foreign superannuation transfers. ☐

6. **Income Protection Insurance**
   Attach premium payments and policy details if you had an income protection policy. ☐

7. **Did you receive income from another entity (such as Partnership, Estate, Trust)?** ☐
   If yes, please complete the following for all income:

   Name of other entity: ____________________

   IRD number of other entity: ____________________

   Amount of income or loss: ____________________

8. **Any other information you think may be relevant** ☐

9. **Donations made**
   Include receipts for donations made to charitable organisations such as registered charities, religious organisations and schools. ☐

10. **Working for Families**
    If you would like us to calculate your Working for Families entitlement, please provide us with details of your children including full name, IRD number and date of birth. We also require details of any other income which may affect your entitlement. For full details please see https://www.ird.govt.nz/income-tax/income-tax-forindividuals/adjust-your-income/types-of-income ☐