

## Individual Questionnaire – 31 March 2024

Name:		Wk Ph:	
Address:		Hm Ph:	
		Mbl Ph:	
		Email:	

To: Morrison & Associates Limited (Franchise Accountants)

### Terms of Engagement

I hereby instruct you to prepare my taxation returns for the 2024 year. I undertake to supply all information necessary to carry out such services, and will be responsible for the accuracy and completeness of such information. I confirm that you have authority to communicate with and obtain information from any third party (including the Inland Revenue Department), through all channels including electronic ones, if the information sought is relevant to your work. I authorise you to communicate with my Bankers, Solicitors, Finance Companies, Department of Inland Revenue (for all tax types except Child Support), ACC or any other person, persons and organisations to obtain such further information as required in order to complete the above. Further, I authorise you in the course of preparing your tax returns to allow Morrison & Associates Limited trading as Franchise Accountants staff and other persons contracted to Morrison & Associates Limited trading as Franchise Accountants access to my information.

I authorise you to represent me as my tax agent. All income tax returns will be signed by me.

I accept that you have the right to charge interest on overdue accounts at the rate of 1.5% per month, and that all accounts are due for payment on invoice. The charging of such interest will be at your discretion. I accept that any collection costs incurred will be fully recoverable from me.

Signature \_\_\_\_\_ Date \_\_\_\_\_

<b>We require the following records to accurately complete your Tax Returns:</b>  Original documents supplied will be returned to you. Any unticked boxes will be treated as not applicable. Where you tick "see attached", please include the relevant information when you forward the questionnaire to us.	<b>N/A</b>	<b>See Attached</b>
• We can obtain information held by the IRD for <b>Wages, ACC receipts, National Superannuation</b> . Please provide confirmation from the person who paid you, if you want us to double check the information held by the IRD.	<input type="checkbox"/>	<input type="checkbox"/>
• <b>Dividend</b> Statements (including shares in Lieu and bonus Shares), <b>interest certificates</b> (including overseas) and PIE Tax Statements for the year.	<input type="checkbox"/>	<input type="checkbox"/>
• <b>Tax advices</b> or copies of <b>financial statements</b> and tax returns which Franchise Accountants do not prepare showing any income or losses received from Companies, Partnerships, Estates or Trusts during the year.	<input type="checkbox"/>	<input type="checkbox"/>
• Receipts for <b>donations</b> .	<input type="checkbox"/>	<input type="checkbox"/>
• Details of any <b>other income</b> you have earned during the year (including from overseas and NZ state funded assistance). Please provide this even if you are unsure as to whether an amount is taxable.	<input type="checkbox"/>	<input type="checkbox"/>

	N/A	See Attached
<ul style="list-style-type: none"> <li>End of year <b>loan summaries</b> for loans you have for investing in an income producing asset such as shares.</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"> <li>The letter regarding payments made towards <b>income protection insurance</b> for the year from your insurance provider.</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"> <li>A list of all <b>shares</b> (including overseas shares) owned at the beginning of the year and the market value of the shares at 31 March. Details need to include the country the shares are from, number of shares, cost, and trades during the year.</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"> <li>A list of all <b>overseas investments</b> including bank accounts and superannuation funds purchased or sold during the year and also those owned by you at the beginning of the year. Details supplied need to include the country the investment is in, contributions and withdrawals from the investment.</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"> <li>Details of any assets that are used privately and also to generate income such as a holiday home. Please refer to our website for '<b>Mixed Use</b>' schedules to help you provide the information required.</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"> <li><b>Details of any other matters</b> relevant to completing and determining your tax position for the financial year including details of any <b>children</b> for Family Assistance purposes.</li> </ul>		<input type="checkbox"/>
<ul style="list-style-type: none"> <li>The IRD can deposit any refunds into your bank account. Please provide your bank account number and the name on the bank account if you would like them to do this Bank account ____/____/_____/____ Account Name_____..</li> </ul>		<input type="checkbox"/>

**Thank you for completing this questionnaire, it will save us time and questions.  
Don't forget to sign it.**