

**M & H 2015 Limited
P O BOX 301401, NORTH SHORE 0745
ANNUAL PERSONAL QUESTIONNAIRE 2023**

CLIENT NAME
IRD NO
EMAIL
MOBILE / PHONE

ENGAGEMENT INSTRUCTIONS

(Please note it is a requirement of the Inland Revenue Department that this questionnaire is completed and signed by the Tax Payer)

TO: M & H 2015 Limited

I undertake to supply all information necessary to carry out the preparation of Financial Statements and Taxation returns in accordance with the regulations and requirements of CAANZ and will be responsible for the accuracy and completeness of such information. If required, this also extends to the preparation of GST, FBT, PAYE, ACC, Dept of Statistics returns, Annual company returns & responsibility for company statutory records.

Your services are not intended to, and accordingly will not result in the expression by you of an opinion of the financial statements in so far as third parties are concerned, or in the fulfilling of any statutory audit requirements.

I give authority to M & H 2015 Limited to act as tax agent on behalf of the above named business and individuals, and to obtain information for all tax types (except child support) from Inland Revenue through all Inland Revenue media and communication channels including electronic until further notice. Authority is also given to communicate with my Bankers, Solicitors and Finance Companies to obtain such further information as required to carry out the above assignments.

I understand that your fee is payable within 7 days of receipt of invoice.

I understand that while every care is taken to advise us of any tax liability, however ultimately, I am responsible for being aware of any tax payments due.

From time to time, M&H 2015 may receive requests to furnish your financial details to third parties. To comply with privacy laws please acknowledge that we accept your verbal authority as legal confirmation in these circumstances.

As per current Anti Money Laundering legislation, I consent to my Personal Information provided to M & H to be disclosed to the Identification Verification Providers, and for them to have authority to use any information they hold in their databases about us to compare against the information I have provided.

Please indicate if you would prefer to receive your annual accounts and invoice by:

Digital PDF (Email)
Hard Copy by Courier / Post

Please supply a bank account number for IRD refunds: _____

CLIENTS SIGNATURE.....DATE.....

1. Information Required for Completing Tax Returns

Provide details of the following if applicable:

- Interest – RWT certificates Yes / No
- Dividends – payment advice slips Yes / No
- Overseas income Yes / No
- Portfolio Investment Income (PIE) – include certificates / fees Yes / No
- Foreign Investment Funds (FIF) – include certificates / fees Yes / No
- Donations – receipts please Yes / No
 You can claim up to 33.33% of the total donation you have made.
 (Where the donation exceeds the taxable income, the excess above
 the taxable income can be transferred to spouse).
 Minimum allowable donation \$5.00
- Electricity authority rebates / dividends Yes / No
- Working for Families Tax Credit Yes / No

Spouse/s income \$

Taxpayer name registered for WFFTC

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Please provide your children’s names, DOB and IRD numbers

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- Holiday Home Rental – There is new legislation regarding renting Yes / No
 Out your holiday home / boat / plane etc. In the even that you rent
 out any of the above, please contact us for the appropriate form.
- Income Replacement Insurance policy – your insurer will provide Yes/ No
 you with evidence outlining deductible amounts paid each year
- Have you exercised any share options related to employment Yes / No
 If yes, please provide details