

Midgley Partners – Questionnaire Income & Taxes

INDIVIDUAL INFORMATION & INCOME TAX 2015

Client Name: _____

WP/ F

Tax Year End: 31 March 2015

Please ✓ the boxes that apply and let us have any material associated with the item.

- Salary / Wages / Directors Fees / Commission / Superannuation*
 - If you receive a “Summary of Earnings” or “Personal Tax Summary” from Inland Revenue please forward it to us.
- Interest and Dividends received*
 - Please provide the vouchers you received with the payment.
- Rents*
 - Please complete the **Rental Checklist**
- Other Income*
Estate / Trust / Partnership / Super / Pensions / Overseas Income – Details Please
- Tax Credits*
Donations – Details Please
- Expenses*
 - Interest paid (where funds were used to buy shares, or for other business or income earning purposes)
 - Income Protection Insurance - Invoice
 - ACC payments.
- Options / sale & purchase agreements* – Details Please
- Family Assistance & Working for Families*
 - If you have children under 18 years – Have we got your children’s details?
- Shares in Lieu of Dividends*
 - Please provide vouchers issued by Company

INDIVIDUAL INCOME TAX 2015

Authorisation

I/We hereby instruct **Midgley Partners** to compile the Income Tax Return for the current Income Tax year, having regard to NZICA SES 2: Compilation of Financial Information if appropriate.

I/We understand in particular that:

- The compilation to be carried out by **Midgley Partners** is limited to the collection, classification and summarisation of financial information supplied by us and does not involve the verification of that information.
- **Midgley Partners** will append their appropriate disclaimer of liability to any compiled Financial Information and/or Income Tax Returns.
- **Midgley Partners** are not required to carry out an audit or review assignment on the compiled Financial Information and/or Income Tax Return.

I/We authorise **Midgley Partners** to continue as our tax agent and where necessary, I/We authorise **Midgley Partners** to sign Income Tax and any other IRD returns that are required on our behalf.

Pursuant to the Privacy Act 1993 I/We hereby authorise **Midgley Partners** to communicate with banks, solicitors, Finance Companies and other persons or organisations to obtain information as required to complete the preparation of the financial statements and tax returns.

Signature: _____

Date: _____

Midgley Partners
March 2015