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## Midgley Partners Income Questionnaire

### INDIVIDUAL INFORMATION & INCOME TAX 2018

Client Name: \_\_\_\_\_

WP/ F

**Income Tax Year End - 31 March 2018**

**Please ✓ the boxes that apply and attach any material associated with the item.**

- Salary / Wages / Directors Fees / Commission / NZ Superannuation (WINZ)** -If you receive a "Summary of Earnings" or "Personal Tax Summary" from Inland Revenue please forward it to us.
- Interest and Dividends Received** -RWT Certificates / Dividend Vouchers
- Rents** -Please complete the **Rental Checklist** – download from www.midgleys.co.nz
- Other Income** - Estate / Trust / Partnership / Sole Trader / Overseas Income / Super Scheme / Pensions
- Tax Credits** -Donations receipts
- Expenses** - Interest paid (where funds were used to buy shares, or for other business or income earning purposes)  
- Income Protection Insurance
- Family Assistance & Working for Families** -Have we got your children's details?  
-Are you entitled to WFFTC?

#### 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 and file with IRD Income Tax and any other IRD returns that are required on our behalf, we take full responsibility for their accuracy.

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.

Name: \_\_\_\_\_ Email: \_\_\_\_\_

Signed: \_\_\_\_\_ Date: \_\_\_\_\_

When completed please send with attachments to **Midgley Partners** via:  
Post: PO Box 3714, Christchurch Mail Centre, Christchurch 8140 or Email: [office@midgleys.co.nz](mailto:office@midgleys.co.nz)

**Midgley Partners**  
March 2018

INDIVIDUAL INFORMATION & INCOME TAX 2018