

**Midgley Partners
Income Questionnaire**

**INDIVIDUAL INFORMATION & INCOME TAX
2019**

Client Name: _____

WP/ F

Income Tax Year End - 31 March 2019

- | | |
|--|--|
| <input type="checkbox"/> Salary/Wages/Directors Fees/Commission/NZ Superannuation/WINZ – If you receive a “Summary of Earning” or “Personal Tax Summary” from Inland Revenue please forward it to us. | <input type="checkbox"/> Pension Income/Super Scheme |
| <input type="checkbox"/> Interest Received – RWT Certificates | <input type="checkbox"/> Managed Portfolio Investments |
| <input type="checkbox"/> Dividends Received – RWT Certificates/Dividend Vouchers | <input type="checkbox"/> Other Income – Please attach information and provide details |
| <input type="checkbox"/> Overseas Income | <input type="checkbox"/> Tax Credits – Donations Receipts |
| <input type="checkbox"/> Rents – Please complete the Rental Checklist – download from www.midgleys.co.nz | <input type="checkbox"/> Expenses – Interest Paid (where funds were used to buy shares, or for other business or income earning purposes) – Income Protection Insurance |
| <input type="checkbox"/> Estate/Trust Income | <input type="checkbox"/> Family Assistance & Working for Families –Have we got your children’s detail’s? Are you entitled to WFFTC |
| <input type="checkbox"/> Partnership Income | |

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 _____ Signature _____ 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