

TERMS OF ENGAGEMENT FOR PERSONAL TAX RETURNS

DETAILS OF ANY ADDITIONAL INCOME OR EXPENSES

Full Name:			
Address:			
Phone:		Cell Phone:	
IRD Number:		Email:	

I request Quantum to process and file my tax return for the year ended 31 March 2023 as follows:-

Summary of Earnings details to be obtained from IRD.	Income should be shown from the following sources:		
If I have received any interest, dividends and/or Maori Authority income during the above year I have added the details here	Paid by	Tax Deducted	Gr ss Amount
	\$	\$
	\$	\$
	\$	\$
	\$	\$
I have not received any self-employment or any other taxable income unless the details are included here	Details	Amount	
	\$	
I have paid the following expenses during the above year that I can claim against my income (e.g. ACC Levies, Accountancy, Business Related Interest).	Details	Amount	
	\$	
Charitable Donations made during year. Tax Credit claim be direct credited to the bank account shown.	Refunds to be deposited to Bank Account Name:		\$
	Bank Account Number:		

Other Information (supply additional page if necessary)

Terms of Engagement

- The person named above appoints Quantum Accounting & Business Solutions Ltd ("you") as agent with to act on my behalf for all tax types (except Child Support) for the purposes of completion of my Taxation Returns with the Inland Revenue Department. Authority is given to obtain information from Inland Revenue about all tax types (except child support). This includes obtaining information through all Inland Revenue media and communications channels. You are authorised to sign any form or to file any return on my behalf.
- We will forward information for the preparation of my Financial Statements and Taxation Returns. We declare that this information will be correct and complete and we do not wish you to conduct an audit or review of this information. We understand that you accept no liability for the accuracy of the information supplied and that Financial Statements are prepared for our purposes only. We also acknowledge that in the preparation of Financial Statements and Taxation Returns, assumptions and determinations are made that may differ from any interpretations made by Inland Revenue and you will not be liable for claims or losses including any penalties imposed by the Inland Revenue Department. We will keep all tax records for a minimum of seven years
- In terms of the Privacy Act 2020 we authorise you to obtain any information that may be required by you in connection with any accounting services that we may engage you to complete, including but not limited to preparation of our Financial Statements and Taxation Returns. The holder of any such information is authorised to release that information to you on sighting this form. You are authorised to supply information on our affairs to our bank, solicitor or any other party notified to you by us. Quantum's Privacy Policy is available by emailing privacy@quantumnz.co.nz
- We acknowledge your terms of trade for any work carried out on my or our behalf (including that Shareholders and Directors signing this Terms of Engagement personally guarantee payment for accounts on behalf of any Trust or Company named on this form) and that payment of accounts is due on the 20th of the month following invoice and that interest of 2% per month plus collection charges may be added to outstanding accounts.

Signed: