

TERMS OF ENGAGEMENT AND DETAILS FOR TAX RETURN

Full Name:			
Address:			
IRD Number:		Email:	Phone Numbers:
Refunds to be deposited to Bank Account Name:		Bank Account Number:	

I request Quantum to process and file my tax return for the year ended 31 March on the following basis:-

Please add further details if any of the following apply:

-	IRD Summary of Earnings	Income should be shown from the following sources:												
-	Details of any interest or dividends income received during the above year	<table border="1"> <thead> <tr> <th>Paid by</th> <th>Tax Deducted</th> <th>Gross Amount</th> </tr> </thead> <tbody> <tr> <td></td> <td>\$</td> <td>\$</td> </tr> <tr> <td></td> <td>\$</td> <td>\$</td> </tr> <tr> <td></td> <td>\$</td> <td>\$</td> </tr> </tbody> </table>	Paid by	Tax Deducted	Gross Amount		\$	\$		\$	\$		\$	\$
Paid by	Tax Deducted	Gross Amount												
	\$	\$												
	\$	\$												
	\$	\$												
-	Details of Self Employment of other Untaxed Income Full Details provided on separate sheet with supporting information if necessary. If Property is held jointly with any other person or has been used privately during the year please advise details	<p>Details of Self Employment or other income that needs to be included in Tax Return</p> <p>Income Received dates received from to Debtor Adjustments Sales during year \$ less Opening Debtors \$ plus closing Debtors \$ = \$ Confirm not registered for GST confirm no WIP or amount if included in the above \$</p> <p>Expenses after allowing for Accounts Payable opening \$ and closing \$</p> <p>Direct Costs against Income (e.g. product purchases including adjustments for Stock) \$</p> <p>Bank Fees \$</p> <p>Insurance \$</p> <p>Interest (Business Related) x % claimable \$</p> <p>Legal Fees \$ (note details) include legal statements for our review</p> <p>Low Value Asset Purchases (<\$500) \$</p> <p>Other \$</p> <p>Other \$</p> <p>Vehicle Claims or Adjustment \$ Total costs \$ x % claimable or km at PSMR rate</p> <p>Home Office Costs Total amount \$ x % for Office Area \$</p> <p>Other \$ details on next page if needed</p> <p>Capital Asset Purchases that need Depreciating</p> <p>Assets at beginning of year at opening book value \$</p> <p>Assets Sold during year \$ Depreciation adjustment \$</p> <p>Assets bought during year \$</p>												
-	Any other taxable income	<table border="1"> <thead> <tr> <th>Details</th> <th>Amount</th> </tr> </thead> <tbody> <tr> <td></td> <td>\$</td> </tr> </tbody> </table>	Details	Amount		\$								
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	\$													
-	Tax Deductible Expenses	<table border="1"> <thead> <tr> <th>Details</th> <th>Amount</th> </tr> </thead> <tbody> <tr> <td></td> <td>\$</td> </tr> </tbody> </table>	Details	Amount		\$								
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-	Charitable donations (attach receipts)	<table border="1"> <thead> <tr> <th>Details</th> <th>Amount</th> </tr> </thead> <tbody> <tr> <td></td> <td>\$</td> </tr> </tbody> </table>	Details	Amount		\$								
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	\$													

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Please enter any other details or add further pages with full information

Terms of Engagement

1. I appoint Quantum Accounting & Business Solutions Ltd ("you") as my agent for the purposes of completion of my Taxation Returns with the Inland Revenue Department. I authorise you to obtain information from Inland Revenue and any other source about all tax types including through Inland Revenue media and communication channels and to make and receive payments and to sign any Inland Revenue forms on my behalf.
2. I have forwarded all information for the preparation of my Taxation Return as set out above. This information is correct and complete and I do not wish you to conduct an audit or review of this information. I understand that you accept no liability for the accuracy of the information supplied and that Financial Statements and Tax Returns are prepared for my purposes only. I 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. I will keep all tax records for a minimum of seven years
3. In terms of the Privacy Act 1993 I authorise you to obtain any information that may be required by you in connection with any accounting services that I may engage you to complete, including but not limited to preparation of my 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 my affairs to my bank, solicitor or any other party notified to you by us.
4. I acknowledge your terms of trade for any work carried out on my behalf 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:

Client Name:	
Details of Self Employment	

Breakdown of Income and Expenses during the Year Ended 31 March

Income Received from	Date	\$
Income Received from	Date	\$
Income Received from	Date	\$
Income Received from	Date	\$
Income Received from	Date	\$
Income Received from	Date	\$
Total Income received during the above year		\$

Expenses to claim against above Income (summarise if necessary or show on separate worksheet)

Date	Amount	Details	Total
	\$		\$
	\$		\$
	\$		\$
	\$		\$
	\$		\$
	\$		\$
	\$		\$
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	\$		\$
	\$		\$
	\$		\$
	\$		\$
Total Expenses	\$		\$

continue on separate sheet if needed, total each Expenses Category to agree with Summary above

Capital Asset and Sale or Purchase Details for Depreciation

Date Purchased	Cost or Value	Item Description	Other (e.g. sale details)
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\$
\$
\$
\$
\$
\$
\$
\$
\$
\$

Continue on separate sheets if needed

Add any relevant notes or questions here :