Business One Limited
Chartered Accountants

Thames | Whitianga
07 868 6461 | 07 866 5418
thames@businessone.co.nz
whitianga@businessone.co.nz
www.businessone.co.nz

Name:

Postal Address:

Mobile Phone:

Business Phone:

Home Phone:

Email:

Client Information Form Year Ended 31 March 2026

AUTHORITY TO ACT AND OBTAIN INFORMATION

I authorise Business One Limited to act on my behalf with, and obtain information from, all agencies (including electronic) necessary to complete my accounts and tax returns. This includes, but is not limited to Inland Revenue, Accident Compensation Corporation, my/our Banks, the Companies Office, Insurance companies and Work & Income NZ.

TERMS OF ENGAGEMENT

We confirm that we have read all the matters in the attached Client Information Form and have provided Business One Limited with all the details and authorisations requested. We now instruct you to prepare financial statements and tax returns for which we agree to be charged on a time and cost basis.

We accept responsibility for the accuracy and completeness of all information supplied by us for the preparation of our financial statements.

We do not wish you to complete an audit or a detailed review of our affairs and therefore we accept that Business One Limited and their staff are unable to provide any assurance on our financial statements.

We also understand that your work cannot be relied upon to detect error and fraud. We agree to Business One Limited attaching to our Financial Statements a compilation report explaining your responsibilities.

Privacy Act 2020: Business One Limited may collect relevant personal Information about us for the purposes of providing accounting services. We authorise Business One Limited to hold, use and disclose such information as is necessary. Business One Limited agrees to handle all Personal Information in accordance with the Privacy Act 2020 and provide access to and correct any such Personal Information as provided for under the Act. We acknowledge and agree that, as part of the on-going quality control initiatives of the Institute of Chartered Accountants of NZ, files relating to assignments completed on my behalf may be examined on a random test basis by an official reviewer appointed by the Society for that purpose.

Electronic Communication: We agree that Business One Limited may communicate with us electronically. We acknowledge that electronic transmissions are inherently insecure, can be corrupted or intercepted, may not be delivered and may contain viruses. We acknowledge Business One Limited is not responsible for any loss suffered in connection with the use of e-mail as a form of communication. We consent to receiving such messages until such time as we notify Business One Limited in writing that we no longer wish to receive them.

In accordance with the Unsolicited Electronic Messages Act 2007, we consent to receiving emails, texts, or other electronic transmissions such as newsletters, notification of seminars, items of interest or promotional material, unless we notify Business One Limited to the contrary.

Name: _____

Signed: _____ **Date:** _____

Personal Tax Return Information

PAYE Income or Income Withholding Tax Deducted

This information is usually sent to us from IRD, however please record below your employer's name/s and/or sources of withholding income so we can confirm IRD details are correct.

Investment Income

Please ensure you have included the following information if applicable

- RWT certificates
- Dividend or distribution statements
- PIE distribution statements
- Full Year Investment Portfolio's i.e. Sharesies
- Cryptocurrency trading statements

If you use an investment manager or advisor, please provide a copy of any portfolio summary reports received during the year.

Foreign Investments & Overseas Pension

If you received any interest, dividends or distributions from a foreign company or held a foreign superannuation scheme or life insurance policy, could you please provide the name and nature of the interest (e.g. shares, units, super or insurance:

Other Income

Please give details of taxable other income you have received which has not been included above. For example, distributions from an estate or trust, insurance proceeds, Māori authority distributions, cash income.

Deductible Expenses

If you incurred any of the following expenses during the year they may be tax deductible:

- Income protection insurance premiums
- Commission charged on interest or dividends received
- Interest incurred on money borrowed to invest
- Expenses incurred in producing withholding income.

Please attach relevant details to allow a claim in your return

Donations, School Fees & Childcare Tax Credits

If you have made donations to a registered charity, church, or school, or have paid childcare costs you may be entitled to claim tax credits. Please enclose all receipts for these costs.

Working for Families Tax Credits

If you have children in your care you may be eligible for working for Families tax credits. To make an estimate of your entitlement we require the following information:

Childs full name	Date of Birth	IRD Number	In your care for full year?	Date left school or care
			Yes	
			Yes	
			Yes	

Did you receive or pay any child support (either private or through IRD)? If yes please provide details

---

The following events may also affect your entitlement; please let us know if any of these apply:

- Receiving income from a trust or close company
- Stopping or starting work
- Child leaving school during the year
- You start living with a partner or become married, divorced or separated
- Receiving a WINZ benefit , ACC payments or a Student Allowance
- Receiving an Unsupported Child Benefit

Rental Property, BnB and Short Stay Rental Income

	Property Address:	Property Address:	Property Address:
If your property is an BnB or Short Stay rental how many days was it rented out?			
How many days was your rental property rented? *(not by you or family)*			
How many days was your property used by yourselves or family? *(If you have paid rent please advise the amount)*			
How many days was the property unavailable for rent? *(If any please state why?)*			

Please attach full details of any rental income received and expenses incurred, we will need:

- Full Year Rental Statements
- Total Rent Received
- Mortgage Statements
- Bank statements if you use a rental account
- Invoices for all assets purchased
- Travel relating to your rental property (*If you did, please include details in the 'Motor Vehicle Expenses'section on page 6.)*
- Details of all expenses, these may include:

Advertising, Body Corp charges, Insurance, Legal fees, property Management fees, Rates & Water charges, any Repairs & Maintenance

If you have purchased or sold a rental property during the year, please include all legal settlement statements and sale & purchase agreements.
Are there any other rental property details we should be aware of:

The Brightline Test & Properties Sold

If you have sold a property during the year, please include all legal settlement statements and sale & purchase agreements.

Is there anything else you want to tell us? (change in business situation, other details?)

Please **save** this form, and return to us through one of the following methods:

- Email this to us along with all relevant documents
- Print off and post to us using the address on the cover page

Save Form Submit Print