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## PERSONAL 2024 Tax Return Checklist

Below is the annual questionnaire for the 2024 tax year.

*IRD require that all clients complete and sign this questionnaire.  
We cannot file your tax return until we have the completed and signed questionnaire.*

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**Have any of your contact details changed?** Office telephone: \_\_\_\_\_ Mobile  
telephone: \_\_\_\_\_ E-mail address: \_\_\_\_\_

### **IMPORTANT – PLEASE READ AND SIGN**

#### **Terms of Engagement**

I/We hereby instruct you to prepare my/our Financial Statements and Taxation Returns. I/We undertake to supply all information necessary to carry out such services, and will be responsible for the accuracy and completeness of such information. I/We understand that you will rely upon the information provided by me/us. Your services are not intended to, and accordingly will not result in the expression by you of an opinion on the financial statements in so far as third parties are concerned, or in the fulfilling of any statutory audit requirements. I/We understand that during preparation of the Financial Statements and Taxation Returns you will not be specifically investigating non-compliance with laws and regulations – however should anything come to light of this nature during this process you will bring that to my/our attention.

I/We understand that the Financial Statements and Taxation Returns are prepared for my/our own use and to determine my/our taxation liabilities. If this should change in any material respect, I/We will inform you immediately. You will not accept any responsibility to any person, other than me/us, for the contents of the Financial Statements.

All other terms and conditions of this engagement are the same as those referred to in the original Engagement Letter I/We signed when I/We became a client.

I/We also accept that Huddle Advisory Limited has the right to charge interest on overdue accounts at the rate of 1.5% per month, and that all accounts are due for payment by the 20th of the month following invoice date. The charging of such interest will be at the discretion of Huddle Advisory Limited. I/We accept that any collection costs incurred by Huddle Advisory Limited will be fully recoverable from me/us.

You are hereby authorised to communicate with my/our bankers, solicitors, finance companies and all government agencies, including IRD, ACC, to obtain such information as you require in order to complete the above assignments.

You are to represent me/us as my/our tax agent. Signature: \_\_\_\_\_

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

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**Comments and notes**

1. We now receive details of your wages direct from the IRD.	
2. Please supply details of interest and dividends received (and documentation).	
3. Please supply receipts for donations/school fees etc. (if you want us to file your rebate claim).  Bank Account Number.....	
4. Please supply details of any income from Trusts, Estates, Companies or Partnerships (if we don't prepare the tax returns for the Trust, Company or Partnership).	
5. Please supply details of any overseas income.	
6. Self Employment – Please complete a Business Checklist.	
7. Please supply details of any Other Income received.	
8. Rent Received – please complete schedule enclosed for each property.	
9. Please supply details of any income protection insurance premiums paid during the year.	
10. Do you have a student loan?    Yes    /    No	
11. Office at home. If you use an area of your home for business purposes - please complete the schedule enclosed.	
12. Working for Families Tax Credits and Parental Tax Credit - Please supply full names and birth dates of all children.  Note the following: • If you had a child born within the current financial year you may be eligible	

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for the Parental Tax Credit, please include a copy of the child's birth certificate or their IRD Number if you already have one.

- Where a child is now financially independent during the current financial year, please advise the date they left school.
- If we do not prepare your spouse or partner's taxation return, please provide us with details of their income.

Childs Name	IRD No.	D.O.B.	Date left School

Please tell us if you receive: any income that we do not know about; you are the settlor of a trust we don't know about; have some of your household bills paid by someone else; your children received income we do not know about.

**Thank you for completing this questionnaire.**

**Please don't forget to sign and date the front page.**