



Entity Name:

Compilation Terms

I instruct Business Like NZ Ltd to prepare my income tax return for the year ended 31 March 2019. I undertake to supply all information necessary to carry out such services and accept responsibility for the accuracy and completeness of such information or failure to supply relevant records and information.

Contact Information

Have there been any changes to your contact information? If yes, please provide details.

Address: _____

Phone: _____

Email: _____

Change in Personal Circumstances

Have there been any changes in living arrangements and / or childcare arrangements during the year? If yes, please provide details.

Account Manager

As well as your usual partner contact, should you have any queries, please contact your Account Manager on 09 262 0726 or info@blnz.co.nz

Dated: _____

Name of Signature: _____

Signed: _____

Please complete the checklist on the next page to ensure you have provided all the applicable information.

Without the signed terms of engagement above and information we cannot schedule your work.



Entity Name:

Records Required from 1 April 2018 to 31 March 2019

Enclosed N/A

Interest received – (attach RWT certificates)	<input type="checkbox"/>	<input type="checkbox"/>
Dividends received – (attach dividend statements)	<input type="checkbox"/>	<input type="checkbox"/>
Income Protection Insurance Policies – please provide certificates	<input type="checkbox"/>	<input type="checkbox"/>
Receipts for Donations Paid (charities, schools or religious organisations)	<input type="checkbox"/>	<input type="checkbox"/>
Superannuation – NZ or Overseas	<input type="checkbox"/>	<input type="checkbox"/>
Any Income you received that was not taxed at source (Not notified to IRD)	<input type="checkbox"/>	<input type="checkbox"/>
Working for Families – see separate checklist www.businesslike.co.nz/checklist-and-business-tools/	<input type="checkbox"/>	<input type="checkbox"/>

Foreign Transactions

Enclosed N/A

Have you immigrated to NZ and since entering have you ever brought funds in from a foreign life insurance or pension/superannuation scheme and not declared this to the IRD? If so, please provide documentation in relation to this.	<input type="checkbox"/>	<input type="checkbox"/>
Provide details of any offshore bank accounts, borrowings, property, investment income or interests in overseas trusts, overseas superannuation and insurance policies.	<input type="checkbox"/>	<input type="checkbox"/>