



2024 CLIENT AUTHORITY / QUESTIONNAIRE AND TERMS OF ENGAGEMENT

If your questionnaire is not completed and signed we are unable to process your accounts.

I authorise you, Horton & Co Limited, to prepare Financial Statements from the information and records I have supplied to you. I advise you not to complete an audit or review. I accept responsibility for the accuracy and completeness of all records and information supplied to you, and for tax payments and any attendant penalties unless it is clearly established to be your fault.

I acknowledge you will charge for your work based on time engaged and that invoices issued by you are payable on the 20th of the month following the date of the invoice unless a special arrangement has been made in writing. I understand that a 5% discount is allowed if payment is made within 10 days (excluding individual tax returns) and that 18% interest per year will be charged on any overdue amount, together with costs of collection. I agree that you may deduct any outstanding fees from tax refunds owing to me. I also agree to accept personal liability for your fees arising from the services I have asked you to undertake.

I also give you my full authority to contact my Bank, the Inland Revenue Department and any other firms for the purpose of obtaining information necessary to complete my Return of Income and Financial Statements. I acknowledge that this information would not otherwise be available due to the Privacy Act restrictions, but I give my full authority for this Statement to be used as written confirmation of my agreement to your obtaining information from the Bank, IRD and other firms for the above mentioned purposes.

Authority is given to act on our behalf for all tax types until further notice. Specifically, authority is given to obtain information from IRD about all tax types. This includes obtaining information through all IRD media and communication channels. Authorization is given for you to sign on behalf as agent where you prepare GST, PAYE, RWT and any other tax returns.

Accident Compensation Corporation

I give Horton & Co Ltd my full authority to act as my agent for ACC levy purposes and for all associated entities. This authorisation allows you to query and change information on my/our ACC levy account(s) through ACC staff, and through MyACC for Business. This authority will also allow your main representative discretion to delegate access to my/our ACC information to other members of the organisation.

Please provide an email address

Please complete all relevant questions and tick the boxes where appropriate.

Principle Client	IRD Number	Signature	Date
<u>Associated Parties - (Directors, Trustees, Partners etc.)</u>			
1			
2			
3			

AML/CFT LEGISLATION

Provide verification of identity, and proof of address required under the legislation eg your passport, and utility bill.

CHARITABLE DONATIONS & SCHOOL DONATION RECEIPTS

Tax credits are available for the above. If you would like us to complete this for you, please supply all donation, and School Donation receipts.

OTHER INCOME

1. **Was there any income or cash payments not banked to your business bank account?** If yes, please provide details.

2. **Did you receive income from any of the following?**

Overseas Income

Rental Income

Look-through Company eg. forestry

Any other Income

3. **Interest and Dividends**

Please supply interest & dividend notices (*showing withholding tax deductions*) for the **2023/2024** year

*Please note, if we do not receive the required Bank, Interest and Dividends statements and request these from the Banks or other Financial Institutions they may charge a fee for **duplicates**.*

WORKING FOR FAMILIES

Do you have children aged under 18 and financially dependent or 18 years and attending either secondary school or tertiary education.

If NO, return to the front page to sign and date the questionnaire.

If YES please provide the following details:

For any new children born during the year please supply their full name, date of birth and IRD number.

If your child left school during the year, please advise the date of leaving school.

Have you had a change in your marital status? (this includes de facto)

Has there been a change in shared custody arrangements?

Did you receive Working for Families during the year?

Did you pay or receive any Child Support from an ex-partner?

Please outline any changes we should know about.

THE PRIVACY ACT 2020 - DECLARATION

The information contained herein shall be used for the following purposes:

- * satisfying your obligations under Inland Revenue and Income Support Legislation
- * completion of funding, budgeting and forecasting requirements for you
- * compilation of practice statistics for our practice
- * satisfying our obligations under the practice review requirements of the New Zealand Institute of Chartered Accountants Code of Ethics

The information will not be used for any other purpose without prior approval from you.

Horton & Co Limited

If your questionnaire is not completed and signed we are unable to process your Accounts.

Page | 2