



Name:

### Compilation Terms

I instruct Business Like NZ Ltd to prepare my income tax return for the year ended 31 March.  
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.

### Client Authority

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](mailto: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.**



Name:

**Records Required from 1 April to 31 March**

**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"/>
Any Income you received that was not taxed at source (Not notified to IRD)	<input type="checkbox"/>	<input type="checkbox"/>

**Foreign Transactions**

**Enclosed N/A**

Provide details of any offshore bank accounts, borrowings, property, foreign investment, investment income or interests in overseas trusts, overseas companies, overseas superannuation and insurance policies.	<input type="checkbox"/>	<input type="checkbox"/>
Is the value of any of your foreign investments over \$50,000NZD at any time during the financial year. (please consider any foreign investments even where held via a NZ investment platform eg Sharesies)	<input type="checkbox"/>	<input type="checkbox"/>
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"/>

**Cryptocurrency and Commodities**

**Enclosed N/A**

Provide details (cost/sale) of any Cryptocurrencies or Commodities (eg. Gold/Silver), sold or traded during the year.	<input type="checkbox"/>	<input type="checkbox"/>
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**Property Transactions**

Have you sold any property held individually to which the brightline rule applies? Please provide details of acquisition date & price, sale date & price, any other costs and information relevant to sale.	<input type="checkbox"/>	<input type="checkbox"/>
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