

Individual Questionnaire – 31 March 2010

Ensure this questionnaire is completed, signed and included with your records

| | | | |
|--------------|---------------|---------|--|
| Client Name | | Phone: | |
| | | Mobile: | |
| Balance Date | 31 March 2010 | Fax: | |
| | | Email: | |

To: Laurenson & Company Chartered Accountants

Terms of Engagement

I hereby instruct Laurenson Chartered Accountants to prepare my Financial Accounts and Taxation Returns for the period ended 31 March 2010. I undertake to supply all information necessary to carry out these assignments and I accept responsibility for the accuracy and completeness of the information, and therefore you are unable to provide any assurance of my financial statements. I understand your work cannot be relied on to detect error and fraud, and that you accept no liability for the accuracy and completeness of the information supplied to me. I further understand that the financial statements will be prepared at my request and for my purpose only, and that you will not be liable for any losses, claims or demands by any third parties.

Laurenson Chartered Accountants are hereby authorised to communicate with my Bankers, Solicitors, Finance Companies, Accident Compensation Commission and Inland Revenue, to obtain such information as you may require in order to carry out the above assignments, including utilizing IRD Info Express and the new "Look Up Account Information" now available online at the IRD website for Tax Agents.

I acknowledge that I may have to pay Tax on 28 August, 15 January, 7 April and 7 May, (unless I am GST registered on a 6 monthly basis, then the Tax payment dates will be 28 October, 7 April and 7 May). If I do NOT have an IRD extension of time arrangement the 7th April payment will move forward to 7 February. I acknowledge that if I have not been advised of such payments, it will be my responsibility to contact you to ascertain if tax is payable.

Signature _____

Date _____

| Records Required | ü | Comments |
|--|--|----------|
| Wages/National Superannuation/Benefits | | |
| Please provide us with the names of any organisations you have received the following from: § Wages § ACC payments § National Superannuation § Any other benefits In most cases IRD will have sent us these details direct, however we do need to check all details have been included. | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> | |
| Student Loan | | |
| Do you have a student loan? If so, please provide your latest statement from IRD | <input type="checkbox"/> | |
| Interest and Dividends | | |
| Please supply the advice slips. § For interest received, you should have an annual advice notice showing the withholding tax deducted. This may be on the bottom of your bank statement dated 31 March 2010 § If any dividends are taken as bonus shares, also include these advice slips | <input type="checkbox"/> <input type="checkbox"/> | |
| Rental and Leased Property | | |
| Please complete attached rental questionnaire | | |
| Withholding Payments | | |

