DM&Co.

Individual Year End Questionnaire

Financial Year Ended:

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You have instructed us to prepare your Financial Statements and Tax Returns. You undertake to supply all information necessary to carry out such services and will be responsible for the accuracy and completeness of such information.

It is important to understand that it is not the responsibility of Darvill Mellors & Co Limited to detect error or fraud and that the work undertaken has been prepared only for you. We are not responsible for any loss or claim by any third party.

You authorise Darvill Mellors & Co Limited to communicate with your bankers, solicitors, finance companies, Inland Revenue, ACC or other third-party organisation to obtain information necessary to prepare your Financial Statements and Tax Returns. If you do not wish us to have this authority, please delete the following **(authority granted).**

____________________________________ ________________

Signature Date

Please complete these details to ensure our records are up to date.

Name:

Contact Numbers:

E-mail:

Postal Address:

Bank Account (for tax refunds to be deposited into):

Questionnaire

Records Required	✓ or N/A
Interest Withholding Tax Certificates RWT Certificates are supplied by your bank or other financial institutions after 31 March (and are available on your online banking).	☐
Dividend PAYE and Imputation Credit Certificates. Including Notices' where dividends are reinvested.	☐
Overseas Shares and Investments. A list of all shares and investments owned at 1st April and 31st March including name of Company, # of Shares and details of all Shares bought and sold during the financial year. For Share Portfolios, please provide the year end taxation report and portfolio valuation report.	☐
Contracting income Please complete the business questionnaire	☐
Rental income Please complete the rental property questionnaire.	☐
Other income Attach details of income received from any other sources.	☐
Income Protection Insurance Attach details of premiums paid if you had an Income Protection policy.	☐
Donations made Attach receipts	☐
Any other information you think may be relevant.	
Did you receive income from a Partnership, Estate or Trust? If yes: *Name of Partnership/Estate/Trust* *IRD Number* *Amount of Income or Loss* *Details of any interest cost to invest in Partnership*	☐