

Chartered Accountants

Name of Client(s) Date of Birth: IRD Number
 / / : : : : : :
 / / : : : : : :

Address Phone # Home
 Business

Balance Date: E-mail

Assignment/Job Description

Terms of Engagement -

- **Records & Information** - I accept responsibility for the accuracy and completeness of the information supplied which is to be used in the preparation of my Financial Statements and/or Taxation Returns. You are not to complete an audit, nor do I wish you to undertake a detailed review of my affairs in order to substantiate the accuracy of my information, and therefore you are unable to provide any assurance on my Financial Statements. I understand your work cannot be relied on to detect error or fraud and that you accept no liability for the accuracy and completeness of the information supplied by me. I further understand that the Financial Statements, GST, PAYE, RWT and FBT Returns etc completed and/or signed on my behalf will be prepared at my request and for my purposes only and that you will not be liable for any losses, claims or demands by me or any third person. I also accept responsibility for all other records and information supplied to you. I accept responsibility for any failure by me to supply all relevant records and information to you.
- You are authorised to contact my previous/existing accountant, who is authorised to provide you with information about professional matters concerning your accepting the appointment and my records. I **have/have not** advised the existing accountant of the proposed change.

Inland Revenue Taxation Agency Links - Flavell & Chamberlain Ltd (IRD Number 111-503-664) as my Taxation

Agents are authorised to discuss with Inland Revenue any matter relating to any tax type or activity for which they are linked as agent as follows:-

	Links	A	/	C		Links	A	/	C
ALL Relevant Tax Types	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	INC - Income Tax	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
GST - Goods & Services Tax	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	PAY - PAYE tax deductions	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
.....	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>

- **Fees** - I accept that Accountancy Fees charged are based upon time involved on my affairs. I accept that such fee invoices are accepted and approved unless queried in writing within 14 days of invoice. I agree to pay such invoice within 14 days and failing payment agree to pay in addition (if charged), Interest at 1.25%pm (15%pa), also debt collection and legal costs subsequently charged/incurred and agree the Privacy Act will not apply if debt collection is necessary. In the event of fees being overdue and Flavell & Chamberlain Ltd being in receipt of any taxation refund or other monies (including Trust/MDS Funds) or where signing authority is held on our bank account on my behalf, then Flavell & Chamberlain Ltd shall have my approval to deduct any overdue fees plus interest, provided that a note of the fees have been rendered to me. Where I am acting in a Trustee/Director capacity I agree that I am personally liable for the payment of the Accountancy Fees and associated charges should the Trust/Company fail to pay.
- **Information Disclosure/Authorities**:- (Privacy Act & Ethical Requirements - valid unless crossed out)
- **Flavell & Chamberlain Ltd are my Chartered Accountant and Taxation Agent and are authorised to:**
 1. Obtain from/supply relevant information to Bankers, Lawyers, Accountants, IRD, ACC, Creditors, Work & Income, Credit References, BankLink, Xero, etc.
 2. Obtain from/supply to Inland Revenue:- Information, Tax Returns, Financial Statements, including updating tax agency records/links, accessing all relevant tax ledger details, updating records, arranging transfers, signing Returns etc, as Agent, on my behalf, by any communication media, as appropriate.
 3. Operate a Trust Account on my behalf within Flavell & Chamberlain's Trust Account.
 4. Pay my outstanding Fees account (if any), from the above Trust Account.
 5. Invest funds on my behalf as appropriate, at commission (if any).
- It is agreed that these Terms of Engagement will continue to apply in the future unless modified in writing

Client Signature(s) _____ **Date** _____
 (If signing for a Company, Partnership or Trust – Please ensure all Directors, Partners or Trustees sign above)