

CLIENT COMPILATION INFORMATION FORM

Date: _____

PERSONAL INFORMATION:

INDIVIDUAL 1

INDIVIDUAL 2

Surname: _____

First Names: _____

Date & Place of Birth: _____

IRD Number: _____

Postal Address: _____

Residential Address: _____

Phone Number: _____

Fax Number: _____

Mobile Number: _____

Email Address: _____

Photo ID: Please provide a copy of Passport or Driver Licence

NUMBER OF DEPENDENTS: _____

Name:

Date & Place of Birth:

IRD Number:

Please sign here

I/We acknowledge and accept the terms of the engagement as summarized above and give my/our approval for Biz Solutions Limited to obtain information as stated.

Name of Entities (please provide full legal names and copy of Trust Deed):

1. _____	IRD No: _____
2. _____	IRD No: _____
3. _____	IRD No: _____
4. _____	IRD No: _____
5. _____	IRD No: _____

 (Individuals, company, trust, partnership etc)

Name: _____ Signed: _____ Witness: _____
 Director / Trustee

Name: _____

Name: _____ Signed: _____ Witness: _____
 Director / Trustee

Name: _____

Name: _____ Signed: _____ Witness: _____
 Director / Trustee

Name: _____

(please cross out the non applicable ones- in case of company with more than one directors, one director can sign on behalf of others, in case of trust all trustees will need to sign this)

Terms of Engagement

I/We confirm that the terms of the engagement are as follows:-

1. I/We have engaged Biz Solutions Ltd to compile my/our annual income tax returns.
2. I/We authorise Biz Solutions Ltd to act as my/our tax agent representative with the Inland Revenue Departments (IRD) for all tax types and benefits such as NZ Super, working for families tax credit, child support and WINZ.
3. Biz Solutions Ltd have not been requested to perform an audit or review engagement.
4. I/We accept and understand that Biz Solutions Ltd will provide no assurance regarding the financial information resulting from the compilation process.
5. I/We have provided all the information that is required to enable Biz Solutions Ltd to complete the engagement, including income from all sources.
6. I/We accept the responsibility for the accuracy of my income tax returns and the assertions contained within. Biz Solutions Ltd's responsibility is to compile my income tax return from the data supplied by me.
7. I/We accept and understand that Biz Solutions Ltd will have no responsibility to third parties arising from this engagement.
8. If we give you our work in draft or orally, we do so only on the basis that you may not rely on it in that form. Accordingly, we will not be responsible if you or anyone else relies on our draft Work or oral comments or advice.
9. I/We indemnify Biz Solutions Ltd against any and all losses, claims, actions, demands, expenses, damages, liabilities or any other proceedings whatsoever incurred by me in respect of any claim by a third party.
10. All civil liability (including interest and costs) of Biz Solutions Ltd which includes any director, partner, employee or agent of Biz Solutions Ltd, to you, concerning the subject matter of this engagement, shall be limited to five times the fee for such assignment.
11. In no circumstances shall Biz Solutions Ltd be liable for accidental indirect, special, punitive or consequential damages whatsoever (including loss of profits) even if Biz Solutions Ltd has been advised of, knew or should have known of the possibility of such loss or damage.
12. I/We acknowledge and confirm that my prior taxation liabilities have been met in timely manner, otherwise disclosure of the same is required to Biz solutions.
13. I/We, authorise Biz Solutions to undertake a credit check with any credit reporting agencies and at it's sole discretion Biz Solutions to assess suitability of acceptance as a client or otherwise.
14. I/We confirm that I have never been bankrupted nor have any legal proceedings filed against me. If any such action has been noted, I will supply details to Biz Solutions.
15. I/We will pay fees incurred by me or any of my associated entities by the due date. Any collection costs on late payment of fees is payable by me. Interest at a rate of 1.5% may apply on overdue accounts. Where my associated company or trust is unable to pay the fees due, I will personally pay for such services. Fee is payable 20th of the month following the invoice.
16. I/We acknowledge that Biz Solutions Ltd holds the right to refuse any engagement, without providing reason for the same.
17. We will provide any tax planning, research and consulting services that you request. Fees for these consulting services will be billed at our standard hourly rates in effect at the time the services are rendered, unless a specific fixed fee agreement is entered into for the specific service.
18. In order to have time to properly prepare (or extend) your tax returns, we ask that you provide the required information within two months after the Company's fiscal year end.
19. You acknowledge and agree that we are not required to continue work in the event of your failure to pay on a timely basis for services rendered as required by this engagement letter. You further acknowledge and agree that in the event we stop work or withdraw from this engagement as a result of your failure to pay on a timely basis for services rendered as required by this engagement letter, we shall not be liable to you for any damages that occur as a result of our ceasing to render services.
20. It is a requirement to keep records related to this engagement and business for seven years. However, Biz Solutions does not keep any original client records, so we will return those to you upon the completion of the services rendered under this engagement. When records are returned to you, it is your responsibility to retain and protect your records for possible future use, including potential examination by governmental or regulatory agencies.

Initial: _____

Terms of Engagement (cont.)

21. Both parties agree to protect and keep confidential any Confidential Information exchanged with each other. Except as required by law or where we otherwise agree, you will keep confidential our Work, any methodologies and technology used by us to provide the services.
22. I/We authorize Biz Solutions to delink my/our tax agent representative with the Inland Revenue Departments (IRD) for all tax types and benefits such as NZ Super, working for families tax credit, child support and WINZ if completed information has not been provided to Biz Solutions prior to end of respective income tax year due date.
23. Unless we agree otherwise, we will retain ownership of the Intellectual Property in our Work.
24. I/We authorize Biz Solutions to liaise with any lender, credit agency, or Government Department, in relation to any financial affairs, if requested to do so in the course of our appointment.
25. If any dispute arises among the parties hereto, the parties agree first to try in good faith to settle the dispute by mediation. If the parties are unable to resolve the dispute through mediation within 60 days from the date notice is first given from one party to the other as to the existence of a dispute and the demand to mediate, then they may proceed to resolve the matter by arbitration if this agreement provides that the particular dispute is subject to arbitration, or by whatever other lawful means are available to them if this agreement does not provide for arbitration of the particular dispute. Costs of any mediation proceeding shall be shared equally by all parties.
26. We appreciate the opportunity to be of service to you and believe this letter accurately summarizes the significant terms of our engagement. If you have any questions, please let us know. If you agree with the terms of our engagement as described in this letter, please sign the enclosed copy and return it to us.

Authority to Obtain information

In order to complete your income tax return and/or financial statements, and to deal with any tax related issues for you, it may be necessary to obtain information from banks, other institutions and IRD (for tax types not linked to our agent listing).

Under the Privacy Act 1993 information holders require authorisation prior to being able to release such information.

In order to speed the whole process up please sign below. This will avoid double handling and time costs.

If you provide full details to us this authority may not need to be used.

I/We authorise the IRD, ACC, WINZ and COMPANIES OFFICE

[name of Bank or other organisation]

to supply information relating to my accounts in the name of

[name of account(s)]

to Biz Solutions and to debit my account(s) for any charges incurred in providing such information.

[Previous accountant(s)]

to Biz Solutions and to debit my account(s) for any charges incurred in providing such information.

[Solicitor(s)]

to Biz Solutions and to debit my account(s) for any charges incurred in providing such information.

This authority continues until such time as it is revoked by me in writing.

Initial: _____