

Individual Checklist

Client name:
Balance date:
Date:



To: REAL Chartered Accountants Limited

Terms of Engagement

I hereby instruct you to prepare my Taxation Returns for the 20__ year. I undertake to supply all information necessary to carry out such services, and will be responsible for the accuracy and completeness of such information. Authority is given to obtain information from Inland Revenue, other government agencies and financial institutions in order to complete the above assignments. This includes obtaining information via phone, fax, mail, email and online services available on the Inland Revenue website.

You are to represent me as my tax agent. All income tax returns will be signed by me however you are authorised to sign any other taxation return on behalf of myself or any of my associated entities.

I also accept that you have the right to charge interest on overdue accounts at the rate of 3% per month, and that all accounts are due for payment by 20th of the month following invoice date. The charging of such interest will be at your discretion. I accept that any collection costs you incur will be fully recoverable from me.

We may utilise the service of third parties, including tax pooling intermediaries, from time to time and as separately notified to you to manage your tax affairs. To perform the services, we provide these third parties with access to your data to the extent this is required to perform the services. This requires information being sent to these services providers in accordance with our Privacy Policy

Signature _____

Date _____