

Individual Questionnaire – 31 March 2026

Please ensure this questionnaire is completed and included with your records

Client Name		Phone	
		Mobile	
Balance Date		Email	
		IRD number	

To: Bella Consultants Limited

Terms of Engagement

I hereby instruct you to prepare our Taxation Returns for the year/period ending 31 March 2026. I undertake to supply all information necessary to carry out such services, and will be responsible for the accuracy and completeness of such information. You are hereby authorised to communicate with my bankers, solicitors, finance companies and all government agencies to obtain such information as you require for completion of the above assignment.

You are to represent me as my tax agent. Authority is given to obtain information from the Inland Revenue about all tax types (except NCP or CPR) until further notice. This includes obtaining information through all Inland Revenue media and communication channels.

I also accept that Bella Consultants Limited has the right to charge interest on overdue accounts at the rate of 1.5% per month, and that all accounts are due for payment by the 20th of the month following invoice date. The charging of such interest will be at the discretion of Bella Consultants Limited. I accept that any collection costs incurred by Bella Consultants Limited will be fully recoverable from me.

Privacy Act 1993

1.1 I and the guarantor/s (if separate to myself) authorise Bella Consultants Limited to:

- a) collect, retain and use any information about myself and/or guarantors, for the purpose of assessing my and/or guarantors creditworthiness; and
- b) disclose information about me and/or guarantors, whether collected by Bella Consultants Limited from myself and/or guarantors directly or obtained by Bella Consultants Limited from any other source, to any other credit provided or any credit reporting agency for the purposes of providing or obtaining a credit reference, debt collection or notifying a default by myself and/or guarantors.

1.2 Where I and/or the guarantors are an individual the authorities under clause 17.1 are authorities or consents for the purposes of the Privacy Act 1993.

1.3 I and/or the guarantors shall have the right to request Bella Consultants Limited for a copy of the information about myself and/or guarantors retained by Bella Consultants Limited and the right to request Bella Consultants Limited to correct any incorrect information about myself and/or guarantors held by Bella Consultants Limited.

Personal Guarantee

Where the name of a guarantor is completed at the foot of this agreement, then that person personally guarantees full payment of any amounts due to us in terms of this agreement.

Signature _____

Date _____

Name / Guarantor _____

Records Required:	✓	Comment:
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Any Other Details

Attach details		
• Income Protection Insurance Policy – provide details of premiums and claims.	<input type="checkbox"/>	
• Look Through Company (LTC) – if you have been allocated a share of a loss other than from a company that we are aware of, please provide details	<input type="checkbox"/>	

Donations Tax Rebates

Have you any rebates to claim?	Yes <input type="checkbox"/> No <input type="checkbox"/>	
If Yes, have you sent your rebate claim form to Inland Revenue?	Yes <input type="checkbox"/> No <input type="checkbox"/>	
Do you want us to complete your rebate claim form?	Yes <input type="checkbox"/> No <input type="checkbox"/>	

Student loan

Do you or any of your family have a student loan? Please list any relevant information.	<input type="checkbox"/>	
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Working For Families Tax Credit

Please supply full names and birth dates of all children. Please note the following:		
• If you had a child born within the current financial year you may be eligible for the Parental Tax Credit. Please include a copy of the child's birth certificate or their IRD Number.	<input type="checkbox"/>	
• Where a child has become financially independent during the current financial year, please advise the date they left school or home.	<input type="checkbox"/>	
• If you have received Family Assistance during the year, please supply the certificate issued to you by IRD, detailing the amounts.	<input type="checkbox"/>	
Also provide details of any child support or maintenance payments made or received.	<input type="checkbox"/>	

Child's Name	IRD number	Date of Birth	Date left school

Thank you for completing this questionnaire

It is essential we receive all the above information to prepare the 2026 financial accounts

Don't forget to sign it