

## 2018 SALARY AND WAGE EARNERS QUESTIONNAIRE (PTS)

**NAME:**

**Please update your contact details below if there have been any changes:**

**Phone:**

**Fax:**

**Mobile:**

**E-mail:**

**Postal address:**

Please take the time to work through this questionnaire thoroughly, action each point that is applicable to you. This will greatly assist us in the efficient calculation of your tax position.



### **Terms of Engagement**

This engagement is subject to Mackay Bailey Limited's current Terms of Engagement which are available on our website: [www.mackaybailey.co.nz/engagement](http://www.mackaybailey.co.nz/engagement)

By signing this page you accept responsibility for all information provided to us and agree to our Terms of Engagement.

### **Authority to Act and Obtain Information**

We may use this authority to obtain additional information should we require it to complete this engagement.

I authorise Mackay Bailey to obtain any financial records necessary to complete my annual report and tax returns for the 2018 year. This may include, but is not limited to, bank statements, co-operative statements, insurance invoices as well as dividend and interest certificates.

I authorise Mackay Bailey to be my Inland Revenue Tax Agent for all tax types and communicate with Inland Revenue on my behalf, including communicating via electronic methods.

I authorise Mackay Bailey to communicate with financiers, banks, solicitors and other advisors as they deem appropriate to obtain information necessary to carry out this engagement.

**Signature:** \_\_\_\_\_

**Full Name:** \_\_\_\_\_

**Date Completed:** \_\_\_\_\_



## Do you require a Personal Tax Summary (PTS)?



