



Annual Accounts Questionnaire 2024 - For XERO Clients

Ensure this questionnaire is completed and included with your records

Client Name:

To: Drive Accounting

Terms of Engagement

I hereby instruct you to prepare my Taxation Return for the 2024 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. You are hereby authorised to communicate with my bankers, solicitors, finance companies and all government agencies to obtain such information as you require in order to carry out the above assignments.

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 2.0% 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 your discretion. I accept that any collection costs you incur will be fully recoverable from me.

I authorise your organisation to act as my agent for ACC levy purposes for all associated entities. This authorisation allows your organisation to query and change information on my ACC Levy account(s) through ACC staff, and through ACC Online Services. This authority will also allow your organisation's main representative discretion to delegate access to my/our ACC information to other members of your organisation. Other delegated members of your organisation will also be able to query and change information on my/our ACC Levy account.

All other terms and conditions of this engagement are the same as those referred to in the most recent engagement letter signed.

Signature	 Date	
Signature	Date	
-		

Tax Refunds

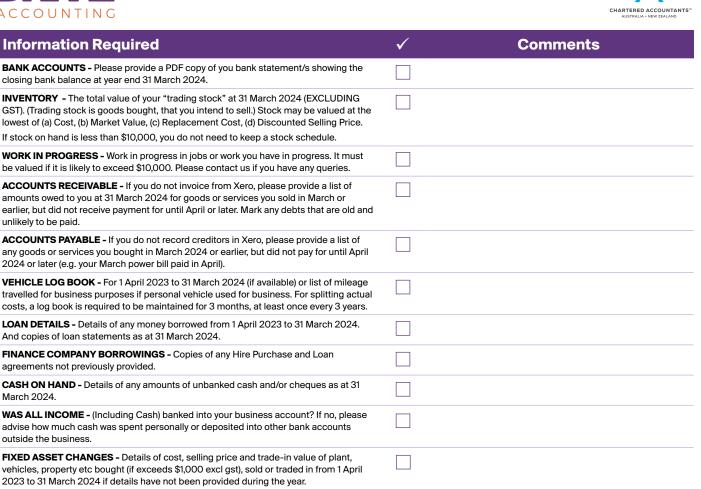
Please provide the bank account number that you would like any tax refunds credited into.

Bank account ____ / ___ _ / ___ / ___ / ___ / ___ / ___ / ___



unlikely to be paid.

March 2024.



GOODS FOR OWN USE - Please advise value of goods taken from business for own use, without payment from personal funds. At cost price (excluding GST) \$ HAS THERE BEEN - Any significant change to your business during the past year that

we are not aware of? If so, please provide details. CONTINGENT LIABILITIES/ COMMITMENTS - Are there any contingent liabilities, lawsuits, guarantees? Are there any commitments for capital expenditure at or since balance date? Are there any commitments under a lease for plant or vehicles? SHAREHOLDING - Has there been any change of shareholding during the past year? If

the company shares are owned by a Trust, have any of the Trustees changed or have any beneficiaries reached age.

Records Required

Home Office Expenses (if applicable)

If part of your home is set aside principally for use as an office/workshop/storage area which is used by you in relation to your rental property business, you may be able to claim a proportion of your home expenses against your rental income. Please provide the following details:

Area used for business:	m²	Γ		
Total area of house and workshop:	m²			
Power	\$			
Phone	\$			
Rent	\$			
Insurance (Building and Contents)	\$			
Interest (House Mortgage)	\$			
Rates (including regional council rates)	\$			
Repairs and maintenance	\$			
Other	\$			
Total	\$			

