

Self Employed Client Income & Expenses Summary

Individual Tax Return

Full Name	<input type="text"/>		
Nature of business	<input type="text"/>		
IRD or WooHoo ID	<input type="text"/>	Financial year	<input type="text"/>
Business start date	<input type="text"/>	Business ceased date	<input type="text"/>

Please note: Our fee for filing a self-employed return is 19.5% of the refund, up to a maximum of \$400. The minimum filing fee for self-employed returns is \$250 per return filed. We require the minimum fee of \$250 before we can commence work on your return.

Income

Please attach copies of your cashbook and/or invoices and indicate the total amount of your self employed income below for the financial year specified.

Total Amount

If you are unable to supply either of these, please provide bank statements indicating the sources of your income.

Motor Vehicle Expenses

Please provide the following proportions of motor vehicle usage as established in your motor vehicle logbook(s):

Business travelled	<input type="text"/>	km
Total travelled	<input type="text"/>	km
Percentage business	<input type="text"/>	%

If you do not have a recorded logbook, please provide receipts for petrol and other relevant business related vehicle expenses:

Total Amount

If you do not have receipts, please provide an estimated total of business mileage:

Total Amount km

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Home Office Expenses

If part of your home is set side specifically for business related usage, please provide the following amounts, along with copies of receipts/bank statements.

Power, gas & heating	\$ <input type="text"/>	Telephone	\$ <input type="text"/>
Insurance	\$ <input type="text"/>	Total	\$ <input type="text"/>
Interest on mortgage	\$ <input type="text"/>	Business area	<input type="text"/> m ²
Rates	\$ <input type="text"/>	Total area of home	<input type="text"/> m ²
Rent	\$ <input type="text"/>		

Fixed Asset Expenses

If you have further assets that you have purchased for business use, along with receipts or bank statements, please list them here.

<hr/>	\$ <input type="text"/>
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Other Expenses

Please provide a list of other applicable related expenses (i.e. Tools, Accounting Fees, ACC Levy etc.), with receipts or bank statements.

_____	\$ <input type="text"/>
_____	\$ <input type="text"/>
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***If your previous year's tax return was filed by an accountant,
please provide us with a copy***

I, (name) _____, authorise NZ Tax Refunds to complete any IR3 tax returns necessary, and to file tax returns on my behalf.

I hereby certify that the statements and information in this form are true and correct.

Your signature	<input type="text"/>	Date	<input type="text"/> / <input type="text"/> / <input type="text"/> (day/month/year)
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