

2023 CONTRACTOR CHECKLIST

NAME _____

PH CONTACT _____ CELL _____ HOME _____

E-MAIL: _____

- If you are uncertain about anything, please ask.
- Use this form when assembling your records.
- This form should be signed and brought in with your information.

Please return completed checklist to

Email: heather@liddellcrook.nz
Post: Liddell and Crook Ltd
PO Box 5365, Papanui
Christchurch 8542

1. Type of Business Activity _____
2. Are you GST Registered? Yes / No
3. Has any Withholding Tax been deducted from your business income? Yes / No
4. Do you use a business bank account? Yes / No

If yes and you are not using software, please supply bank statements or cash book.

5. Income Received – please supply copies of invoices
6. Expenses Claims Please tick any applicable types and provide receipts or a list.

Tools & Equipment (including Safety Equipment)

Courses and Training

Professional Fees

Business Insurance

Business Travel

7. **Home Office Claim**

Total Area of Home

Area used for office

Power & Gas

Insurance

Rates

Mortgage Interest (attach loan statement) or Rent Paid

8. **Telephone**

Landline 50% Line Rental _____

Internet Costs _____

Mobile Phone Costs _____

9. Motor Vehicle Running

Business percentage to be claimed as per your logbook _____

OR Kilometres travelled for business purposes _____

10. Other Business Expenses

Bank Fees/Interest _____

Accountancy/Legal _____

Other Business Costs _____

11. Fixed Assets

Please list below any significant purchases (over \$1,000) or sales of assets.
Please provide name, date purchased, cost, and finance agreement if applicable.

TERMS OF ENGAGEMENT (Please read and sign)

I hereby instruct you to prepare my Contractor Statement and tax return on a Special Purpose reporting basis to comply only with the requirements of the Income Tax Act. I understand the financial reports should not be relied on for any other purposes.

I accept responsibility for the accuracy and completeness of the information supplied above which is to be used in the preparation of my financial statements. You are not to complete an audit, nor do I wish you to undertake a detailed review of my affairs in order to substantiate the accuracy of my information, and therefore you are unable to provide any assurance on my financial statements. I understand your work cannot be relied on to detect error and fraud and that you accept no liability for the accuracy and completeness of the information supplied by me.

I accept responsibility for any failure by me to supply all relevant records and information to you. You are hereby authorised to communicate with Bankers, Solicitors, Finance Companies to obtain such further information as may be required to carry out the above assignment.

I _____ (name) authorise Liddell and Crook Ltd to obtain information from Inland Revenue regarding all tax types (except Child Support) until further notice and to correspond with Inland Revenue as may be required to carry out or auxiliary to completing the above assignment. This includes obtaining information through all channels including, but not limited to, the online services available on the Inland Revenue website.

I acknowledge I will be charged on a time and cost basis for the completion of this work.

I authorise my accountant, Liddell and Crook Ltd, to link any tax accounts required from Inland Revenue.

Name	Signature	IRD No
_____	_____	_____

Date _____