

Authority to Act

Ensure a questionnaire is completed and included with your records

Client Name			
IRD Number		Phone:	
Balance Date		Email:	

To: Dennis O'Grady Limited

Terms of Engagement

I/ We hereby instruct you to prepare my/our Taxation Returns (and Financial Statements, if applicable) for the year/ period ending noted above. I/ We undertake to supply all information necessary to carry out such services, and will be responsible for the accuracy and completeness of such information including the disclosure of any cash received.

I/ We give authority to Dennis O'Grady Limited and staff/ contractors as applicable to act on my/our behalf for all tax types until further notice. Authority is given to obtain information from Inland Revenue and other financial institutions including banks, solicitors, finance companies and all other government agencies to enable my tax returns to be completed. Information may be requested/ obtained using any/ all channels media.

I/ We give authority for Dennis O'Grady Limited to sign at their discretion any tax return on my/ our behalf any of my/ our associated entities, based on information submitted by myself and provided by the IRD or any relevant party.

Accident Compensation Corporation

I/ We authorise Dennis O'Grady Limited to act as my/ our agent for ACC levy purposes for all associated entities. This authorisation allows Dennis O'Grady Limited to query and change Information on my/ our ACC levy account(s) through ACC staff, and through MyACC for business. This authority will also allow Dennis O'Grady Limited's main representative discretion to delegate access to my/ our ACC information to other members of the organisation. Other delegated members the organisation will also be able to query and change information on my/ our ACC levy account(s).

Do you have any overseas financial activity **No** **Yes**
(Please completed overseas income questionnaire)

Signature _____

Date _____

Our full terms of engagement are available on our website (version 202402) or available in hard copy upon request.

In accordance with the AML/CFT Act If you have not provided information in the past, Please attach a copy of your drivers licence/ passport and proof of address for each Individual, Trustee and Shareholder.

Don't forget to complete a questionnaire