**NEW CLIENT PAGE**

Are you a new client? If so we need the following information.

Is this the first year that you have worked as a self employed person?

 YES NO (circle one)

IF YES

1. Beside the other info required on the check list please:

Provide a full list of equipment, motor vehicles, etc, the month and year you bought it and how much it cost, e.g.

 Stereo June 13 $600

 Wah Pedal February 12 $75

 Fender Stratocaster March 14 $1500

 Holden Astra November 16 $10500

 Asus Laptop January 16 $1895

1. If you are a tradesman you will have tools that you can “pool” together to give us and claim depreciation on. This also applies to musicians. If you have a number of small items like effects pedals, mic and music stands, metronomes, mics etc, you can pool them all together and claim depreciation on them at a high rate, also add up all your music cds, tapes, LPs, DVDs, music books & magazines, scores etc that you are bringing into the business that you already own (not new stuff that you bought after that – they go in the various categories in Appendix A). We only need the numbers, not the values as we will total them, then multiply that by $5 per unit IRD rate and claim depreciation on your music library (very important as this can give you a larger refund).

IF NO

1. Please provide a copy of the last return you filed. We can’t start without it.
2. Have a look at the depreciation schedule that the last accountant (or you yourself) filed last year and update it for us, i.e. is it accurate, what has been sold, what have you bought since, what is obsolete and you want removed. You can do that in the depreciation area in Appendix A.
3. Are your car details accurate? If not, update us please in the Depreciation area of Appendix A.

NOTE FOR ALL NEW CLIENTS

1. Items you can add to your depreciation list are:

 a) All musical equipment.

 b) CDs, LPs, music DVDs, books and music magazines (originals only, see 2, under ‘YES’, above)

 c) Equipment specifically used in your music room e.g. tables, chairs, couches, computers, printers, curtains, carpet, heaters, etc.

 d) Stereo, TV, DVD/CD player, “boom box”, iPod, iPad, MP3, Cellphone, etc.

 e) Motor Vehicle.

2. We require your summary of earnings from the IRD and as many pay slips you can provide from your various employers (a summary of earnings from each would be a help so we can verify the IRD’s figures.) plus all other income details.

3. If you are the member of a band operating as a partnership or company, we will need a copy of the previous year’s return from you.

4. A copy of your last ACC Levy Invoice.

5. Anything else you think will be useful to us in processing your tax return.

Now fill out the Appendix A boxes and provide us with your information for this year please.