[Insert DD Month YYYY]

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[Insert Client Name]

[Insert Client Address]

[Suburb]

[City, Post Code]

Dear [Insert Client Name]

**Re:** **[Insert year] [Entity] Tax Return**

Thank you for allowing us to assist with your taxation needs. We are pleased to enclose [entity’s] completed Income Tax Return for the year ended 31 March [insert year].

Please review the Income Tax Return marked ‘Client Copy’ attached to this letter [OR inside the folder]. Once you are satisfied that the Income Tax Return is correct, please sign the attached declaration where indicated and send it back to this office so that the Income Tax Return can be lodged with Inland Revenue.

*The declaration that you are signing includes a commitment that you have the necessary proof of the deductions and retain all records for seven years after the end of the income year to which it relates pursuant to section 22 of the Tax Administration Act 1994. This will include but is not limited to receipts for expenses, logbooks, and other records. If you do not have these records, or have any questions about the necessary records, please contact us.*

Subject to Inland Revenue confirmation, we estimate that upon assessment you will be [required to pay income tax OR receiving an income tax refund] of $XXX.XX. This amount has been calculated based on a taxable income of $XX,XXX.XX.

Your [insert next income year] provisional tax liability based on the standard uplift is $XXXX.XX. Payment of this is due in three equal instalments on 28 August [insert year], 15 January [insert year] and 7 May [insert year] [based on a 31 March year end]. We will contact you closer to the due dates to ensure that necessary payments are made.

We also enclose our account for the preparation and lodgement of [Entity’s] Income Tax Return.

Finally, we'd like to thank you for your support and the opportunity to be of service to you.

If you have further queries on any details contained in this letter or on any other matter, please feel free to contact us on [insert telephone number].

Yours sincerely

[Insert Name and Title]

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| Encl. |