

Accountants Letter



All fields on this form are mandatory. Please return the completed form to your customers' Mortgage Adviser.

BORROWER DETAILS

Full name:

NZBN:

Company name/Trading name:

Business Address:

Primary function of business:

FINANCIAL INFORMATION

Provide current income figure(s) (*not projected income*)

Net Profit before tax: \$

Director(s) Salary: \$

Please provide an explanation of how the above has been calculated, including documents used (e.g. GST Returns, BBS, invoicing etc)

Please confirm how long you have been preparing the above businesses financials?

Please confirm when you last lodged tax returns for this entity

Explanation of why an accountants letter is being used/explain why most recent lodged returns are not provided

ACCOUNTANTS INFORMATION

Accountants name:

Company name:

Business Address:

Landline telephone number:

Body Membership Number:

Please confirm which body you are registered with:

New Zealand Institute Chartered Accountants (NZICA)

Chartered Accountants Australia & NZ (CA ANZ)

Accountants and Tax Agents Institute of New Zealand (ATAINZ)

ACCOUNTANTS DECLARATION

Please tick to confirm:

I am not aware of any factors which may impact the borrower/s capacity to make repayments without causing financial hardship

I can confirm that I'm not related to the applicant(s) and do not have any conflicts of interest in completing this declaration

Accountants signature:

Date:

***Please be advised that someone from our Select Mortgages team will call you to discuss this letter.**

***Any amendments to this letter will require alternative means of income verification.**

Accountants Letter 'How to' Guide

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Explanation of why an accountants letter is being used/explain why most recent lodged returns are not provided

To be completed in full by the customer's Accountant only (typed or handwritten)

Full name of all individual applicants that derive income from this entity.

One IRD number per form, must be accurate and relate to the income being declared. If income is derived from a trust, the trust IRD needs to be quoted and not the trustee IRD.

One company/trust name per form. Must be accurate and relate to the income being declared, aligned to the NZBN quoted.

Company's current net profit before tax (directors salary excluded).

Director's salary separate to the net profit of the business.

Detailed explanation of the information and documents used to confirm current income.

Explanation to be provided that confirms why an accountant letter is being used.

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Accountants signature: Date:

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***Any amendments to this letter will require alternative means of income verification.**

Accountants details need to be accurate and will be verified via independent sources.

Body membership number for the Accountant must be provided and registered. This will be verified by the Chartered Accountants Australia and NZ website.

Declarations must be selected for the accountant declaration to be acceptable.

Accountant to sign and date, with a wet signature only. Electronic signatures are not acceptable.

IMPORTANT: We cannot accept an amended accountants letter to verify income.

All information on the accountants letter must be completed in full, accurate and matching the customers declaration when submitted to Select. Other income verification will need to be provided if there are any errors or missing information on the form.