

## ANNUAL PERSONAL INFORMATION CHECKLIST FOR YEAR ENDED 31 MARCH .....

**Please advise any known or expected changes to your income for the ensuing year. This is particularly relevant for provisional tax payers.**

|                  |
|------------------|
| Name: .....      |
| Telephone: ..... |
| Email: .....     |

**SOURCE DEDUCTED INCOME**

|                                       | Yes                      | N/A                      |
|---------------------------------------|--------------------------|--------------------------|
| Wages and salaries                    | <input type="checkbox"/> | <input type="checkbox"/> |
| NZ Superannuation                     | <input type="checkbox"/> | <input type="checkbox"/> |
| Interest Income                       | <input type="checkbox"/> | <input type="checkbox"/> |
| Dividend Income                       | <input type="checkbox"/> | <input type="checkbox"/> |
| Overseas Income (interest/dividends)* | <input type="checkbox"/> | <input type="checkbox"/> |
| Overseas Pensions*                    | <input type="checkbox"/> | <input type="checkbox"/> |

\*(Ensure dates of receipt and currency are specified).

**OTHER SOURCES OF INCOME**

**Rental Income**

Please attach details of rents received and expenses incurred (e.g. mortgage interest, rates, insurance, repairs, collection fees).

**Partnership Income** (if we do not prepare the accounts)

Name of Partnership .....

IRD Number .....

Type of Income (e.g. rental) .....

Share of Taxable Profit/Loss .....

**Estate or Trust income** (if we do not prepare the accounts)

Name of Estate/Trust .....

IRD Number .....

Amount of Distribution .....

Amount of Tax Credits .....

Is Tax paid by the Trust? .....

**LAQC Losses** (if we do not prepare the accounts)

Company .....

IRD Number .....

Share of Loss .....

**REBATES AND DONATIONS**

Donations made – You may claim a rebate for any of the following provided you donate \$5 or more:

|   | Yes                      | No                       |
|---|--------------------------|--------------------------|
| Donations to any school, school Board of Trustees or parent teacher association. These payments must be donations, not payments of fees for tuition, attendance, dues for specific activities such as school trips. | <input type="checkbox"/> | <input type="checkbox"/> |

Housekeeper or Creche. We require the name of the person and the amount paid.

**WFFTC** (if not provided previously)

If you think you may be entitled to Working For Families Tax Credits please provide the following:

- a) Name of "Principal Child Carer" .....
- b) Child/Children for whom you were "Principal Child Carer" with IRD numbers. ....
- .....
- c) Date(s) of Birth .....

Number of hours worked:

Principal .....

Partner .....

Were you the principal child carer for the whole year? If No, for what period?

Working For Families Tax Credit received

**NOTES:** Please send us all details relating to any rental property. Depending on how you have paid it might be easiest to send all bank statements or all invoices, (or both).

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