

Personal Tax Return - INFORMATION REQUIRED

(Please Circle YES/NO if question related to you and info has been provided).

FAMILY DETAILS

a. Do you have a spouse? (Married or de facto) **YES/NO**

If YES, please supply their: Full Name.....

IRD Number.....

b. Did you receive Working for Families Tax Credit (WFFTC) last year? **YES/NO**

If YES, and we do not prepare spouse's Tax Return, please supply a copy.

If claiming WFFTC, please supply birth certificates of dependent children less than 18 years (unless you have supplied them to us before).

Your date of birth _____

2. INCOME

Please advise if wages, Commissions, Superannuation, Accident Compensation, Unemployment Benefit, Family Support are received **YES/NO**

- If YES, we will get details from IRD.

Did you receive any salary, wages, fees, commission, pensions, etc, for which there was no certificate received?

YES/NO If YES, please supply details.

3. INTEREST RECEIVED

Did you receive any interest, or have any interest credited to it?

(Please include PIE Certificates) **YES/NO**

If YES, provide resident withholding tax deduction certificates for all interest received.

NOTE: FOR OVERSEAS INTEREST PLEASE ADVISE CURRENCY QUOTED.

4. DIVIDENDS RECEIVED

Did you receive any dividends, or have any dividends credited to it? **YES/NO**

If so, provide dividend statements for all dividends received.

Include distributions from New Zealand or Overseas Unit Trusts.

Include all shares issued in lieu of dividends and taxable bonus issues.

- If you receive income from overseas dividends you may need to value your portfolio as at **31/03/2020**.

Does the cost of all overseas shares held exceed \$50,000? **YES/NO**

NOTE: FOR OVERSEAS DIVIDENDS PLEASE ADVISE CURRENCY QUOTED.

5. RENT RECEIVED

Did you receive any income from rent? (If so, supply details) **YES/NO**

6. ESTATE, TRUST OR PARTNERSHIP INCOME

Did you receive any income from an Estate, Trust or Partnership? **YES/NO**

If YES, please supply details and advice notices received or name and address of person to contact.

7. SELF EMPLOYED/BUSINESS INCOME

If you received any income from self-employment, please complete a (Business checklist) for your business, or supply a copy of your accounts.

Did you personally receive a share of income/loss from any other entity for which We do not prepare their accounts/tax, during the year? If yes, please supply details. **YES/NO**

8. OTHER INCOME

Do you have any other income from New Zealand or Overseas not mentioned above such as:

- Profit on sale of shares or other investments acquired for resale
- Cash jobs
- Tips **YES/NO** If YES, please supply Details

9. EXPENSES

There is presently no deduction available for employment related expenses except for income protection insurance.

a. Did you incur any expenses against withholding payments? (IR13). **YES/NO**

If YES, please supply list and receipts.

b. Did you borrow money or incur any direct costs relating to any of your investments?

YES/NO

If YES, please give details of interest and other costs.

c. Income Protection Insurance? **YES/NO** If YES, please supply details.

10. REBATES

a. If your income is between \$24,000 & \$54,000, and you or your spouse did not receive family benefit;

State the number of weeks you worked more than 20 hours per week _____

b. Did you or your spouse make any donations? **YES/NO**

11. BANK ACCOUNT - We require an up-to-date Bank Account, for IRD refunds.

Bank Account Name **Branch & Account Number**.....

Do you want to sign your tax return via electronic signature **YES**..... **NO**.....

(if Yes, you will receive an email prompt from us once we have finalized your tax return, by approving You will electronically sign the tax return)