



PERSONAL INCOME CHECKLIST FOR THE YEAR ENDED 31 MARCH 2018

Client Name:

Please complete separate page for each person that requires a personal tax return.

IRD number	Birthday	Bank account number for refunds

Section 1 - Refunds & Donations

Yes No

- (a) Do you wish to have any income tax refund direct credited to your account?
If "yes", provide bank and account numbers.
- (b) Did you make any donations during the year and have a receipt for that donation?
If "yes", please email us a copy of the receipt.

Section 2 - Income Details

- (a) Did you receive, or believe you are entitled to receive, Working for Families payments?
- (b) Were you a outside NZ for more than 183 days during the income tax year?
- (c) Did you receive income from Salary, Wages, Withholding Tax Income or WINZ?
If you received withholding income, please provide details of this income. While we receive records from the Inland Revenue Department, often they can be wrong in regards to withholding tax deductions.
- (d) Did you receive income from a trust or estate? *If "yes", please provide income details.*
- (e) Did you receive income from overseas? *If "yes", please provide income details.*
- (f) Did you receive income or losses from a partnership?
If "yes", attach details of the income, e.g. financial statements, tax certificates etc.
- (g) Did you or will you receive shareholder salaries from businesses for which we do not prepare the financial statements?
If "yes", provide supporting details, e.g. financial statements, or show who prepared the financial statements and tax returns for those businesses so we can determine the details.
- (h) Did you receive income from rents? *If "yes", provide details. If appropriate, complete our "Annual Checklist – Investment Properties".*
- (i) Did you receive income from interest or dividends? *If "yes", please provide income details.*
- (j) Did you have any other income? *If "yes", please provide income details.*
- (k) Did you receive losses from a look through company (LTC) for which we do not prepare the financial statements? *If "yes", provide supporting details, e.g. financial statements, or show who prepared the financial statements and tax returns for those businesses so we can determine the details.*
- (l) Can you claim expenses e.g. income protection insurance? *If "yes", attach details of the claim, e.g. receipts or certificates.*
- (m) Did you have an interest in a foreign company, unit trust, life insurance policy or superannuation fund? *If "yes", attach details of the interest in particular entity.*