



ANNUAL CHECKLIST – PERSONAL

For the financial year ended 31 March 2017 (or balance dates from 01/10/2016 to 30/09/2017)

PERSONAL INFORMATION

NAME:

ADDRESS:

CONTACT NUMBERS: Home: Mobile:

Work: Fax: Email:

INCOME DETAILS

Interest or Dividends

Details of any investments income (New Zealand and overseas).

Shareholder Salaries

Details of any shareholder salaries received from businesses (where we do not prepare the information for you).

Other Income

Details of any other income (excluding PAYE Wages or WINZ payments).

Trust

Details of any income from another trust, unit trust or an estate (where we don't prepare the information for you).

Partnership

Details of any income from a partnership (where we don't prepare the information for you).

Rental Income

Details of rental income – unless you have completed the *Rental* property checklist.

Self-employed Income

Please fill in our *Business* checklist.

Overseas Income

Please state **any** income received from an overseas source.

As there is complex tax legislation in relation to overseas pensions and investments, please supply details of these and we can determine the tax implications (if any).

EXPENSE DETAILS

Deductible Expenses

Details of any expenses incurred in deriving income from sources other than employment (ie income protection insurance etc). Please attach supporting documentation.

REBATES

Donations

Receipts for donations and school donations.

Bank Account

Please provide your bank account number so the rebate can be direct credited straight in to your bank account.

Bank Account Number:

_____|_____|_____

WORKING FOR FAMILIES

Working for Families

Details of children under 18 years of age and still at school for whom you may be entitled to family assistance.

Name

Date of Birth

IRD Number

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.....
.....

Name and dates of any children who left school during the year:

Name

Leaving Date

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.....

Change of Circumstances

Details if any of your circumstances changed during the year. For example, shared custody arrangements, change in marital or relationship status etc.

Average hours worked per week

Principal caregiver: Partner:

DISCLOSURES

Residency

Were you a non-resident at any time during the income tax year?

ACC Levies

Did you work more than 20 hours per week?

ACC Information

Please provide your ACC number so we can confirm any ACC levies for the year (if applicable):