

Individual Checklist – 1 April 2019 to 31 March 2020

Ensure this checklist is completed and included with your records

Name		IRD Number	- -
Address		Phone	
Email		Cell phone	

Records Required

Did you receive wages?

Yes - Employer's name: _____

N/A

Interest and Dividends - Please supply the advice slips.

For interest received, you should have an annual advice notice showing the withholding tax deducted.

Attached

N/A

Dividends - If any are taken as bonus shares, also include these advice slips.

Attached

N/A

Rental and Leased Property Owned as an Individual(s)

Please complete one rental schedule per property.

Attached

N/A

Overseas Income - Attach details

Include overseas interest, dividends, wages received and taxation paid.

Attached

N/A

Note: New Zealand residents are liable for tax on all world-wide income.

Any Other Income - Attach details

Income Replacement Insurance Policy - provide details of premiums and claims.

Attached

N/A

If you have been allocated a share of a profit or loss from any other entity - Partnership / Company / Look Through Company / Trust that we do not do the accounts for please provide a copy of accounts and tax returns.

Attached

N/A

Donations

You may complete a rebate claim for yourself, however, if you would like us to complete your rebate claim form, then indicate and attach relevant receipts.

Attached

N/A

Working for Families, In Work Tax Credit and Family Tax Credit

Do you and/or your spouse/partner receive Working for Families?

Yes

No

Please supply full names and birth dates of all children. Please note the following:

- If you had a child born within the current financial year you may be eligible for the Parental Tax Credit. Please include the child's details below.

- You can get In Work Tax Credit if you work for at least:

30 hours each week as a couple

Yes

No

20 hours each week as an individual

Yes

No

- Where a child has become financially independent during the current financial year, please advise the date they left school or home. Also provide details of any child support or maintenance payments made or received, along with any change in custody arrangements.

Child's Name

IRD No.

Date of Birth

Date left School

_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____