

Individual Checklist – 1 April 2023 to 31 March 2024

Ensure this checklist is completed and included with your records

Name		IRD Number	- -
Address		Phone	
Email		Cell phone	

Interest and Dividends - Please supply the payment 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 tax residents are liable for tax on all world-wide income.

We need all paperwork for overseas income as IRD now require that we provide more information as to the source of the overseas income & tax paid.

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

Do You have a Family Trust?

If you have a family trust, please provide details of all trustee minutes including changes to trustees & beneficiaries, and details of any funds settled on the trust. If you are unsure what to provide, please contact us. 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 Best Start Tax Credit. Please include the child's details below.
- 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

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