

Personal tax information checklist

2017 tax year

Name:

Contact phone:

e-mail:

Residency		Yes	IF YES	No
Have you lived outside New Zealand during the year ended 31/03/17?			<i>Please state date of departure and date of arrival.</i>	
Income and investments				
Have you received or do you have any of the following:		Yes	IF YES	No
A	Schedular Payments with tax deducted at source.		<i>Please provide details of expenses to claim against your contracting income.</i>	
B	Interest earned in NZ		<i>Please enclose all certificates notices, etc</i>	
C	Interest earned overseas			
D	Dividends NZ Companies			
E	Dividends Australian Companies (exempt from the FIF rules)			
F	Investments in Australian companies (subject to the FIF rules)			<i>Please complete a Foreign Investment Fund (FIF) worksheet. (This can be downloaded from our website or ask us to send you a copy.)</i>
G	Investments in foreign company shares			
H	Investments in foreign unit trusts			
I	Investments in foreign life insurance, endowment etc policies		<i>Please provide us with details of these and any communications received during the 2016/17 year</i>	
J	Investments in foreign superannuation or pension funds			
K	Investments in any other kind of foreign equity scheme			
L	Do you, together with associated persons, have a 10% or more income interest in any foreign entity		<i>Please provide full details of your shareholdings.</i>	
M	Distributions from an Estate or Trust		<i>Please provide full details.</i>	
N	Partnership income - Active Partnership income - Passive e.g. rental		<i>Please provide full details</i>	
O	Overseas Income other than that listed above?		<i>Please provide full details</i>	
P	a) Shareholder's/director's income from a company b) Does your company (or trading trust) receive 80% or more of its income from personal services and from one or more sources which are related?		<i>Please provide full details</i>	
R	Do you receive regular income from a foreign superannuation scheme		<i>Please provide full details and a copy of any annual certificates received.</i>	
S	Other Income not included above		<i>Please provide full details</i>	
T	Income from Rental Properties		<i>Please provide full details of rent received and outgoings on property, e.g. rates, insurance, repairs, mortgage interest etc. Also provide a copy of any legal statements relating to the sale or purchase of a rental property and details of financing and loans.</i>	

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(Continued)

2017 tax year

Expenses	Yes	IF YES	No
Do you have LTC losses to claim?		<i>Please provide full details.</i>	
Losses brought forward		<i>Please include IRD Loss Notice if you have one.</i>	
Income protection insurance. <i>If already claimed in business please note this</i>		<i>Please provide full details.</i>	
Expenses against "active" partnership Income not already claimed by the partnership.		<i>Please provide full details.</i>	
Can you claim home office expenses?		<i>Please download a claim form from our website or ask us to send you one.</i>	
Do you have a Student Loan?		<i>Please provide full details.</i>	
Have you paid interest on money borrowed to buy shares or an interest in a business?		<i>Please provide full details.</i>	
Expenses against "Passive" income e.g. monitoring fees		<i>Please provide full details.</i>	

Rebates	Yes	IF YES	No
Do you work full time? i.e. 30 hours or more per week			
If NO - how many hours per week			
Are you entitled to Working for Families rebates?		<i>Please download a claim form from our website or ask us to send you one.</i>	
Donations made to Charitable Organisations or to schools		<i>Please supply all of your donation receipts.</i>	