

Name: _____

2017 Tax Return Checklist – Personal

Please check the list below to ensure you have provided all applicable information for the year ended 31 March 2017.

Records Required	Enclosed	N/A
Income - Salary, Wages, ACC, Benefits		
Working for Families – see separate checklist www.businesslike.co.nz/checklists/		
Superannuation – NZ or Overseas		
Interest received -attach RWT Certificates		
Dividends received – attach dividend statements		
Shareholder-employee Salary where we do not prepare the accounts		
Income from Rents – complete rental questionnaire		
Income from Estate/Trust/Partnership/Business (if we do not prepare the accounts)		
Income from sale of Shares or other property (not your residence)		
Any Other Income ; eg forestry schemes, overseas income, PIE income not taxed at correct rates.		
LTC losses – if you have been attributed a share of a loss from an LTC that we do not prepare the accounts for, please provide the details.		
Income Protection Insurance Policies – please provide certificates		
Any Other Expenses ; eg management fees, return preparation fees, interest paid on money borrowed for shares		
Details of any property sold within two years of ownership (except your family home)		
Foreign Transactions		
<ul style="list-style-type: none"> • Have you immigrated to NZ and since entering have you ever brought funds in from a foreign life insurance or pension/superannuation scheme and not declared this to the IRD? If so, please provide documentation in relation to this. • Provide details of any offshore bank accounts, borrowings, property, investment income or interests in overseas Trusts. 		
Donations paid to NZ registered charities, schools & churches – attach receipts		

TERMS OF ENGAGEMENT

I accept responsibility for the accuracy and completeness of the information supplied above which is to be used in the preparation of my tax return. You are not to complete an audit, nor do I wish you to undertake a detailed review of my affairs. I understand that you are unable to provide any assurance on my tax return and that you accept no liability for the accuracy and completeness of the information supplied by me.

Signed: _____