

Name _____
2018 Annual Checklist - Individual

Compilation Terms

I instruct Business Like NZ Ltd to prepare my income tax return for the year ended 31 March 2018. I undertake to supply all information necessary to carry out such services and accept responsibility for the accuracy and completeness of such information or failure to supply relevant records and information.

Contact Information

Address: _____
 Phone: _____
 Email: _____

Have any of the above details changed? If yes, please provide details.

Account Manager

As well as your usual partner contact, should you have any queries, please contact your Account Manager on 09 262 0726 or info@blnz.co.nz

Dated: _____
 Full Name: _____
 Signed: _____

Records Required from (Year Start Date) to (Year End Date)	Enclosed	N/A
Interest received – (attach RWT certificates)		
Dividends received – (attach dividend statements)		
Income Protection Insurance Policies – please provide certificates		
Receipts for Donations Paid (charities, schools or religious organisations)		
Superannuation – NZ or Overseas		
Any Income you received that was not taxed at source (Not notified to IRD)		
Working for Families – see separate checklist www.businesslike.co.nz/checklists		
Foreign Transactions	Enclosed	N/A
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.		
Identification	Enclosed	
Due to the new Anti-money Laundering rules coming into force for Accountants from 1 October 2018, we need to ensure we have sufficient identification of all our clients on file. Therefore, please attached a copy of either your passport or drivers licence.		