Individual End of Year Checklist

For each individual tax return required please provide the following information:

Income & Expenses	
Interest received & RWT certificates issued by banks and financial institutions	
Dividends received – attach dividend advices	
Rental property income & expenses - attach relevant documentation	
Share / bond purchases or sales – attach relevant documentation	
PIE / Kiwisaver income – attach PIE tax statements	
Overseas income or overseas investment income	
Details of any Income or losses from an estate, trust, partnership or Look-through company that we do not prepare the Annual Accounts for	
Other income received with no tax deducted	
Deductible expenses – attached details of expenses incurred in earning income e.g. loss of income insurance, interest on loans used to acquire investments	
Please note that we receive your Salary & Wages, NZ Superannuation and Withholding Income details directly from Inland Revenue, so you do not need to provide this.	

Property Sales	
Please tick if you have sold ANY properties during the year (including personal property) as any tax implications will need to be considered	

Student Loan	
Please tick if you have a student loan	

Children's Tax Returns	
Please tick if you would like us to complete tax returns for your children - if so, please provide all of the above information for them (as applicable), along with the following details:	

Name:		Name:	
Date of Birth:		Date of Birth:	
IRD Number:		IRD Number:	
Name:		Name:	
Date of Birth:		Date of Birth:	
IRD Number:		IRD Number:	

Working For Families	
Please tick if you are currently receiving Working For Families	
If you are not currently receiving Working For Families, please indicate if you would like us to assess whether you will be eligible for this - also ensure that any children's details have been entered above	

Donations	
If you would like us to complete an IR526 rebate for any donations you have made during the year, please attach all donation receipts	