

INDIVIDUAL CHECKLIST - 1 APRIL 2018 TO 31 MARCH 2019

Name		IRD Number	
Address		Phone	
Email		Cellphone	

Records Required

Did you receive wages?

Yes - Employer's Name _____ N/A Attached

Interest and Dividends - Please supply the certificates

For interest received, you should have an annual certificate showing the withholding tax deducted. This may be on the bottom of your bank statement dated 31 March or the bank will send it separately.

N/A Attached

If you received any dividends, please supply paperwork.

N/A Attached

Rental and Leased Property Owned as an Individual(s)

Please complete attached rental schedule per property.

N/A Attached

Overseas Income - Attach Details

Include overseas interest, dividends, wages received and taxation paid.

N/A Attached

NOTE: New Zealand Residents are liable for tax on all world-wide income

Donations Rebate

You may complete a rebate form yourself, however if you would like us to complete your rebate claim form, then indicate and attach relevant receipts.

N/A Attached

Working for Families, In Work Tax Credit and Family Tax Credit

Do you and/or your spouse/partner receive Working for Families?

Yes

No

If so, please provide full names and date of birth for all children.

NOTE:

* If you had a child born within the current financial year you may be eligible for the Parental Tax Credit. Please include a copy of the child's birth certificate or their IRD Number.

* You can get In Work Tax Credit if you work for at least:

* 20 Hours each week as a couple

Yes

No

* 30 Hours each week as a couple

Yes

No

* Where the child has become financially independent during the current financial year, please advise the date they left school or home. Also provide any details of child support or maintenance payments made or received.

Child's Name

IRD Number

D.O.B

Date Left School

Signed

Date

Signed

Date