



INDIVIDUAL CHECKLIST - 1 JUNE 2023 TO 31 MAY 2024

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 Statements

N/A Attached

NOTE: IRD may record your investment income now on Summary of Income, therefore it is a good check to have your original documents also please, to ensure nothing is missed.

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

Crypto Currency / Bitcoin

Do you own any Crypto Currency? Please provide details.

N/A Attached

NOTE: Cryptocurrency is treated like property for tax purposes, and the proceeds you make from selling it is taxable, as well as recording any gains or losses.

Donations Rebate

You may complete a Rebate application yourself on myIR, however if you would like us to complete your Rebate claim, then indicate and attach relevant receipts.

N/A Attached