Blackler Smith & Co
Chartered Accountants and Business Advisers

Annual checklist for personal tax return

For the year ended 31 March _____

(Note: Please use a separate new form for each individual person. We are happy to receive all information electronically).

Please note that where we are acting for any of your companies, trusts, partnerships, etc we will incorporate the relevant information into your personal tax return.

Your full name: ______________________

1. PERSONAL DETAILS

Please provide any important changes or additional contact details below (This is optional).

Business telephone	____________________
Home phone	____________________
Mobile	____________________
Email addresses	____________________
Fax	____________________
Preferred postal address	____________________
	____________________
Home address	____________________
	____________________

2. BIG ISSUES?

Yes? N/A?

Has there been (e.g.):

- Any redundancy payment?
- Any major changes from the last financial year? e.g.
  - Inheritance received?
  - Payments from overseas?
  - Are you a non New Zealand tax resident? If you are unsure please talk to us.
- Any income or expenses not shown below (i.e. to be provided later)?

3. WAGES, SALARIES, SUPERANNUATION, SELF-EMPLOYED INCOME (that has been taxed when received as PAYE)

Yes? N/A?

Please list employers/payers of the above. (We will obtain the amounts from Inland Revenue's records).

4. INTEREST RECEIVED

Yes? N/A?

Please provide interest certificates and/or amounts from each payer.

5. DIVIDENDS RECEIVED

Yes? N/A?

Please provide dividend statements and/or amounts from each payer.

6. OVERSEAS MONEY & INVESTMENTS	Yes?	N/A?

Please provide details of any payments received from overseas. This will include withdrawals from overseas savings/pension funds as well as overseas interest received, or overseas dividend certificates.

If you have an overseas pension scheme, please provide details of where this is held, amounts held and payments received from any scheme.

If you have any overseas investments please let us know what these are.

7. PORTFOLIO INVESTMENT ENTITY (PIE) INVESTMENTS	Yes?	N/A?

Please provide details of your investments including a statement showing your Prescribed Investor Rate (this is the rate at which tax is deducted in your managed PIE investment).

8. TRUST or ESTATE DISTRIBUTIONS RECEIVED	Yes?	N/A?

Please provide details of any distributions you have received from family, estates or other trusts.

9. SHAREHOLDER SALARY	Yes?	N/A?

Please provide details of any shareholder salary you have been allocated from a company (that has not been taxed as PAYE).

10. LOOK THROUGH COMPANY (LTC) INCOME or LOSS	Yes?	N/A?

Please provide details of any income or loss from any Look Through Companies.

11. RENTAL INCOME (please request a Rental Income Checklist).	Yes?	N/A?

12. SELF EMPLOYED OR FARMING INCOME (UNTAXED)	Yes?	N/A?

(please request a Rental Income Checklist).

13. PARTNERSHIP INCOME RECEIVED	Yes?	N/A?

Please provide details of any income from partnerships that you have received. (e.g. a forestry partnership).

14. OTHER INCOME	Yes?	N/A?

Please provide details of any other personal income (taxed or untaxed) not included elsewhere.

15. INCOME PROTECTION INSURANCE	Yes?	N/A?

If you have a policy could you please provide a copy of the policy and invoice.

If you do not have income protection would you like to discuss this with us? (yes or no)

16. STUDENT LOAN	Yes?	N/A?

Do you have a student loan?

17. WORKING FOR FAMILIES

Yes? ○ N/A? ○

Do you think you are eligible for Working For Families Tax Credits? If so, please provide:

- Name of principal caregiver ______________________
- Children for who you were the principal caregiver:

Child's name	Date of Birth	IRD Number	Were you the principal caregiver for the whole year?	
_______________	_______________	_______________	_______________	(yes or no)
_______________	_______________	_______________	_______________	(yes or no)
_______________	_______________	_______________	_______________	(yes or no)
_______________	_______________	_______________	_______________	(yes or no)
_______________	_______________	_______________	_______________	(yes or no)
_______________	_______________	_______________	_______________	(yes or no)

18. DONATION REBATES

Yes? ● N/A? ○

- Please attach receipts for any donations to approved charitable organisations, kindergartens or schools during the year.

19. OTHER NOTES AND COMMENTS

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Thank you! Please ask for about anything you may be unsure about. If in doubt about whether to include something, we suggest you throw it in!

If you have suggestions about how to improve this checklist please also let us know.

PRIVACY ACT

Signed agreement for directors and employees of Blackler Smith & Co. (BSCO Ltd) to be able to file tax returns for all tax types, obtain information from and provide information to: Inland Revenue Department regarding my/our tax affairs, ACC, our bank, lawyer, payroll provider and other advisors in respect of our business and taxation affairs. This may be by way of telephone, email/online services, fax, or in-person meeting on behalf of:

Signed and dated ______________________ __________ 202__