

PERSONAL INCOME TAX RETURN CHECKLIST – 2018



Name

Date of Birth

IRD Number

Tick if included

INCOME

Did you receive any salary, wages, National Superannuation, Social Welfare, Benefit, Family, Assistance, Accident Compensation etc

Note: Details of this are not required as IRD will provide full details directly to us

Please provide the following if applicable:

- Interest** - all RWT certificates / PIE Income
- Dividends** - all dividend warrants (including shares in lies and bonus issues)
- Rents** - Details of gross rents received and expenses to be claimed against this income (eg. rates interest, repairs, insurance)
- If property has been bought or sold during the year we require copies of settlement statements, sale and purchase agreement and loan documentation
- Estate or Trust** - Details of any income and any tax paid by the estate/trust
- Partnerships** - Details of any share of income or losses in all partnerships and any tax paid
- Overseas Income** - **Details of any other income overseas sourced income and all investments held overseas.**
- Other Income** - Full details of any other source of income not included above. eg. shareholder salaries from entities we do not act for.
- LTC** - If you have been attributed a share of loss, please provide details.
- PLEASE NOTE:** - **Portfolio Investments** – If you own investments in companies domiciled outside New Zealand you will need to list and value these as at 1 April 2017. This will form the basis of the portfolio tax calculation which is levied on 5% of their value. In addition we need all sale and purchase details during the year 1/4/17 to 31/3/18.

DEDUCTIONS:

Please provide details of the following expenses if applicable:

- fees incurred for return preparation (other than Barlow McCormack Limited)
- expenses against income that has been received with withholding tax deducted
- interest incurred in relation to personal loans for business related activities or share purchases
- income protection insurance premiums paid
- ACC Levies Paid
- Working for Families:** - The income to be included in this calculation has changed. See separate questionnaire if you think you are eligible.

OTHER

Student Loan - Please advise details of loan, repayments etc

Rebates – Donations made during the year

Please forward the receipts to us so we can calculate your rebate

Sign: _____ Date: _____

For further copies of this questionnaire please contact us or visit our website www.barlowmccormack.co.nz