

## PERSONAL AND OTHER INCOME 2015 FINANCIAL YEAR

*Please note, as your Tax Agent we can source your taxed income details directly from the IRD.*

◆ Please attach the following or mark N/A:

| Attached (✓) | N/A |
|--------------|-----|
|--------------|-----|

|  |                          |
|--|--------------------------|
| <input type="checkbox"/> Bank Account Number for <b>ALL REFUNDS.</b> _____<br>( All Tax Refunds will now be direct credited to your bank account by the IRD) | <input type="checkbox"/> |
|--|--------------------------|

|  |                          |
|--|--------------------------|
| <input type="checkbox"/> All interest advice notices showing details of the resident withholding tax (PAYE on interest) and gross interest received. | <input type="checkbox"/> |
|--|--------------------------|

|   |                          |
|---|--------------------------|
| <input type="checkbox"/> All dividend payment advices showing details of the resident withholding tax ( PAYE on dividends), imputation credits and gross dividends received. Details of Bonus Share Issues. | <input type="checkbox"/> |
|---|--------------------------|

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| <input type="checkbox"/> Did you incur any expenses? Examples are: Income Protection Insurance, Interest paid on funds borrowed for Business/Shares. | <input type="checkbox"/> |
|--|--------------------------|

**Are you registered for Working for Families Tax Credits? YES/NO**

The Inland Revenue will calculate your end of year square-up, please provide the following details for our records:

| Childs Full Name | Date of Birth | IRD#  |
|------------------|---------------|-------|
| _____            | _____         | _____ |
| _____            | _____         | _____ |

|   |        |
|---|--------|
| ◆ Did your marital status change during the year? | YES/NO |
| If so, please advise the date of change:.....     |        |

|  |        |
|--|--------|
| ◆ Did you receive or pay maintenance or Child Support during the year? | YES/NO |
| If so, please advise the amounts:                                      |        |

|   |                          |
|---|--------------------------|
| <input type="checkbox"/> ◆ Please attach any Year End Letters from Inland Revenue showing the amount of Family Tax Credits or Child Support payments you received/paid during the year. | <input type="checkbox"/> |
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| <input type="checkbox"/> Provide details of any other income .....<br>..... | <input type="checkbox"/> |
|---|--------------------------|

|  |                          |
|--|--------------------------|
| <input type="checkbox"/> NZ Superannuation Recipients Only – Details of any non-taxable Pensions or annuities from registered superannuation schemes or details of any overseas pensions received this year. | <input type="checkbox"/> |
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|   |                          |
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| <input type="checkbox"/> Receipts for Donations, including donations to schools/kindergartens | <input type="checkbox"/> |
|---|--------------------------|