

PERSONAL AND OTHER INCOME 2016 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**

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|--------------------------|--|--------------------------|
| <input type="checkbox"/> | Bank Account Number for ALL REFUNDS . _____
(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"/> |
| <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:

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<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	<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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<input type="checkbox"/>	Receipts for Donations, including donations to schools/kindergartens	<input type="checkbox"/>
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