

**PERSONAL AND OTHER INCOME
 2020 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 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?
If so, please advise the date of change:..... | YES/NO |
| ◆ Did you receive or pay maintenance or Child Support during the year?
If so, please advise the amounts:
..... | YES/NO |
| <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"/> |
| <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"/> |
| <input type="checkbox"/> Receipts for Donations, including donations to schools/kindergartens | <input type="checkbox"/> |