

PERSONAL AND OTHER INCOME 2021 FINANCIAL YEAR



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

Do you have any Change of Address, email or other contact details from the previous year?
Details: _____

- | 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? 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:

- ◆ **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.**
- Provide details of any other income
- 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.
- Receipts for Donations, including donations to schools/kindergartens