

# PERSONAL AND OTHER INCOME 2022 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:** \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

- | <b>Attached</b> (✓)   | <b>N/A</b>               |
|---|--------------------------|
| <input type="checkbox"/> Bank Account Number for <b>ALL REFUNDS.</b> _____<br>( All Tax Refunds will be direct credited to your bank account by IR)   | <input type="checkbox"/> |
| <input type="checkbox"/> All interest certificates showing details of the resident withholding tax and gross interest received.   | <input type="checkbox"/> |
| <input type="checkbox"/> All dividend statements showing details of the resident withholding tax, imputation credits deducted and gross dividends received.<br>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