

PERSONAL INCOME TAX RETURN CHECKLIST – 2011



Name

Date of Birth

IRD Number

INCOME

Did you receive any salary, wages, National Superannuation, Social Welfare, Benefit, Family, Assistance, Accident Compensation etc

Note: Details of this are not required as IRD will provide full details directly to us

Please provide the following if applicable:

- | | | |
|------------------------|---|--------------------------|
| Interest | - all RWT certificates / PIE Income | <input type="checkbox"/> |
| Dividends | - all dividend warrants (including shares in lies and bonus issues) | <input type="checkbox"/> |
| Rents | - Details of gross rents received and expenses to be claimed against this income (eg. rates interest, repairs, insurance) | <input type="checkbox"/> |
| | - If property has been bought or sold during the year we require copies of settlement statements, sale and purchase agreement and loan documentation | <input type="checkbox"/> |
| Estate or Trust | - Details of any income and any tax paid by the estate/trust | <input type="checkbox"/> |
| Partnerships | - Details of any share of income or losses in all partnerships and any tax paid | <input type="checkbox"/> |
| Overseas Income | - Details of any other income overseas sourced income | <input type="checkbox"/> |
| Other Income | - Full details of any other source of income not included above. eg. shareholder salaries from entities we do not act for. | <input type="checkbox"/> |
| L A Q C | - If you have been attributed a share of loss, please provide details. | <input type="checkbox"/> |
| PLEASE NOTE: | - Portfolio Investments – If you own investments in companies domiciled outside New Zealand you will need to list and value them as at 1 April 2010. This will form the basis of the new portfolio tax calculation which is levied on 5% of their value. (There is no such tax payable by individuals who own investments which altogether cost less than \$50,000 in total). This area will inevitably involve extra compliance costs and we are anxious to reduce these costs for you. | <input type="checkbox"/> |

DEDUCTIONS:

Please provide details of the following expenses if applicable:

- | | | |
|------------------------------|--|--------------------------|
| | - fees incurred for return preparation (other than Barlow McCormack Limited) | <input type="checkbox"/> |
| | - expenses against income that has been received with withholding tax deducted | <input type="checkbox"/> |
| | - interest incurred in relation to personal loans for business related activities or share purchases | <input type="checkbox"/> |
| | - income protection insurance premiums paid | <input type="checkbox"/> |
| | - ACC Levies Paid | <input type="checkbox"/> |
| Working for Families: | - Do you have children under 18 years of age and still at school – if yes please provide details. | <input type="checkbox"/> |

OTHER

Student Loan - Please advise details of loan, repayments etc

Rebates – Donations, Childcare, Housekeeper etc

Please forward the receipts to us so we can calculate your rebate

Sign: _____ Date: _____

*For further copies of this questionnaire please contact us or visit our website
www.barlowmccormack.co.nz*