

PERSONAL INCOME TAX RETURN CHECKLIST – 2010



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
- Dividends** - all dividend warrants (including shares in lies and bonus issues)
- Rents** - Details of gross rents received and expenses to be claimed against this income (eg. rates interest, repairs, insurance)
 - If property has been bought or sold during the year we require copies of settlement statements, sale and purchase agreement and loan documentation
- Estate or Trust** - Details of any income and any tax paid by the estate/trust
- Partnerships** - Details of any share of income or losses in all partnerships and any tax paid
- Overseas Income** - Details of any other income overseas sourced income
- Other Income** - Full details of any other source of income not included above. eg. shareholder salaries from entities we do not act for.
- L A Q C** - If you have been attributed a share of loss, please provide details.
- 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 2008. 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.

DEDUCTIONS:

Please provide details of the following expenses if applicable:

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

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