

2020 - PERSONAL TAX RETURN CHECKLIST

CLIENT _____ BALANCE DATE 31 March 2020
30 June 2020

PH CONTACT _____ BUS. _____ HOME _____
CELL _____

E-MAIL _____

- * If you are uncertain about anything, please ask.
- * Use this form for assembling your records.
- * The form must be signed and brought in with your information.

INCOME

Note: A summary of your earnings will be obtained from Inland Revenue.

1. Did you receive any interest and / or dividend income Yes/No
* *Please attach all annual resident withholding tax certificates provided by each source of interest income.*
* *Please attach all advice slips which accompany dividend payments.*

2. Have you any investments in P.I.E's (Portfolio Investment Entities)? Yes/No
* *Please attach certificates for income earned for the year.*

3. Did you receive income from any other source Yes/No
* *Please supply details of income from:*
 - Partnerships
 - Trusts
 - Overseas
 - Pension other than from the New Zealand Government
 - Other

4. Do you have any overseas investments Yes/No
* *Please advise **ALL** details of investments and income received.*

5. Did you receive income from which withholding tax was deducted (IR13) Yes/No
* *Please provide details of expenses in relation to this income.*

6. Did you receive income from a rental property Yes/No
* *If a rental checklist is not supplied, please supply details of the following:*
 - Address of rental property
 - Length of time property was rented during the year
 - Statement showing rent received
 - A detailed list of all expenses supported by receipts. Include rates, insurance, interest, repairs, collection fees etc.
 - Details of any chattels purchased or sold
 - Details of any properties purchased or sold (Solicitors statements).

7. Did you make any donations or pay for school fees Yes/No
* *Please advise the amounts and attach receipts*

8. Do you qualify for Working for Families Tax Credits?
If you qualify, or think you qualify for the Working For Families Tax Credits please complete the WFTC Checklist. If you didn't receive one please call or e-mail our office.
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TERMS OF ENGAGEMENT (Please read and sign)

I hereby instruct you to prepare my Income Tax Return / Statement of Income to comply only with the requirements of the Income Tax Act 1994.

I accept responsibility for the accuracy and completeness of the information supplied to you. I accept responsibility for any failure by me to supply all relevant records and information to you. You are hereby authorised to communicate with Bankers, Solicitors, Finance Companies to obtain such further information as may be required to carry out the above assignment.

I/We _____ (name) authorise Liddell and Crook Ltd to obtain information from Inland Revenue regarding all tax types (except Child Support) until further notice and to correspond with Inland Revenue as may be required to carry out or auxiliary to completing the above assignment. This includes obtaining information through all channels including, but not limited to, the online services available on the Inland Revenue website.

I acknowledge I will be charged on a time and cost basis for the completion of this work.

I authorise my accountant, Liddell and Crook Ltd, to link any tax accounts required from Inland Revenue.

Accident Compensation Corporation

I/We authorise Liddell and Crook Ltd to act as my/our agent for ACC levy purposes and for all associated entities. This authorisation allows Liddell and Crook Ltd to query and change information on my/our ACC levy account(s) through ACC staff and through MyACC for Business.

This authority will also allow the organisations' main representative discretion to delegate access to my/our ACC information to other members of the organisation. Other delegated members of the organisation will also be able to query and change information on my/our levy account(s).

Name

Signature

IRD No

Date _____