

TAX TEAM INDIVIDUAL CHECKLIST

FULL NAME: _____

BALANCE DATE: 31/3/2026

CONTACT DETAILS:

PHONE: _____

EMAIL: _____

	Taxpayer 1	Taxpayer 2
1. Did you earn any wages, salaries or NZ superannuation during the year?	Y/N	Y/N
2. Did you earn any interest income during the year? If yes, please provide the Resident Withholding Tax Deduction Certificate/s.	Y/N	Y/N
3. Did you earn any overseas income (including interest, dividends, rental income, superannuation, other income) during the year? If yes, please provide details and attach all statements.	Y/N	Y/N
4. Did you earn any dividends during the year, including your power dividend? If yes, please provide all your dividend statements/advices.	Y/N	Y/N
5. Did you earn any rental income? If yes, please complete a Rental Property Checklist.	Y/N	Y/N
6. Did you earn any other income during the year, such as commission sales or odd jobs? If yes, please provide the details.	Y/N	Y/N
7. Are you a partner, shareholder or beneficiary in a business/investment/trust for whom I am not the accountant? If yes, please provide details.	Y/N	Y/N
8. Did you make any donations to charities during the year? If yes, please provide the original donation receipts.	Y/N	Y/N
9. Do you have Loss of Income Protection Insurance? If yes, please provide the invoice and details.	Y/N	Y/N

Have you changed your postal address, telephone, mobile or email address?
If yes, please provide details:

I/We hereby instruct you to prepare my/our financial statements and taxation returns for the year/period ending 31 March 2026. I/We undertake to supply all information necessary to carry out such services and will be responsible for the accuracy and completeness of such information. Your services are not intended to, and accordingly will not result in the expression by you of an opinion on the financial statements in so far as third parties are concerned, or in the fulfilling of any statutory audit requirements. You are hereby authorised to communicate with my/our bankers, solicitors, finance companies and all government agencies to obtain such information by all forms of communication and media as you require in order to carry out the above assignments.

I/We authorise you to obtain my/our tax information from the Inland Revenue Department for all tax types other than Child Support. This information can be obtained through all forms of Inland Revenue communication and media channels including electronic ones. Also to make transfers of payments and credit balances between periods, different tax types and IRD numbers as required

Signed: _____

Date: ____/____/____