Stephen Larsen and Co
TAX AND BUSINESS ACCOUNTANTS

2016 Annual Personal Checklist

Full Name: ____________________________

Postal Address: ____________________________
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____________________________ - _ _ _ _

Physical Address: ____________________________
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____________________________ - _ _ _ _

IRD Number: _ _ _ - _ _ _ - _ _ _ *(eight digit numbers start from second space)*

Direct Dial: (_ _) _ _ _ _ _ _ _
Primary Phone: (_ _) _ _ _ _ _ _ _
Secondary Phone: (_ _) _ _ _ _ _ _ _
Fax: (_ _) _ _ _ _ _ _ _
Mobile: _ _ _ _ _ _ _ _ _ _ _ _
Email: ____________________

If any of the above details are missing or incorrect, please amend accordingly

Client Declaration

To: Stephen Larsen & Co
Tax & Business Accountants

I/We hereby instruct you to prepare financial reports and tax returns.
I/We undertake to supply all the 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 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 review or audit requirements.

Authority to Act

I ____*(name of person giving authority)*____ give authority to Stephen Larsen and Co to act on behalf of the person named below for all tax types (except NCP or CPR) until further notice.
Authority is given to obtain information from Inland Revenue about all tax types (Except NCP or CPR). This includes obtaining information through all Inland Revenue media and communication channels
Authority is also given to act as my/our agent and communicate with any appropriate bankers, lawyers, finance companies and other persons or organisations to obtain such further information as is required to carry out the above assignments.

Full Name ____*(Person's name from above)*________.

IRD number _ _ _ - _ _ _ - _ _ _ *(copy from above)*

Signature ________________________________

Date: D D / M M / Y Y Y Y

On the following pages are a series of questions you need to complete in order for us to complete your Personal Tax Return
Please ensure you sign the above before you bring in your records to us.

Please complete the following questions:

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1. Have you received Wages or a Salary with PAYE deducted? ☐ **Yes** ☐ **No**

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2. Did you receive any Interest & Dividend Income in this year? ☐ **Yes** ☐ **No**

If 'Yes' please bring in all details of Interest received from any source. If you have had interest from any Bank you need to bring in your Interest Earned Certificates which show the amount of Resident Withholding Tax that has been deducted.

Please bring in all details of Dividends you have received from any source, You need to bring in your Dividend Statements which show the amount of Imputation Credits or Withholding tax that has been deducted.

2.1 Have you purchased any shares in the last year? ☐ Yes ☐ No

Please note;
- a) All shares received from NZ or overseas companies in lieu of dividends are taxable
- b) Joint account interest and dividends will be allocated equally to the owners of the account
- c) Include any dividends received from AMP, AXA, TOWER or other insurer.

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3. Other Income

Did you receive income from any of the following sources?

- Business or Self-Employed Income ☐ Yes ☐ No
- Foreign Income ☐ Yes ☐ No
- New Zealand Superannuation ☐ Yes ☐ No
- Overseas Superannuation ☐ Yes ☐ No
- Accident Compensation ☐ Yes ☐ No
- Commission, Fees and other income ☐ Yes ☐ No
- Have you received any income from a Trust or Estate for which we do not prepare the accounts? ☐ Yes ☐ No
  If 'Yes' please provide details:

  ____

  ____

  Estate or Trust IRD No: _ _ _ - _ _ _ - _ _ _
- Partnership Income ☐ Yes ☐ No
- Family Assistance ☐ Yes ☐ No
- Unemployed or other Benefits ☐ Yes ☐ No
- Loss from a Loss Attributing Qualifying Company ☐ Yes ☐ No
- Rental Income ☐ Yes ☐ No
  If 'Yes' please complete the attached Rental Property Checklist and bring it in with your records

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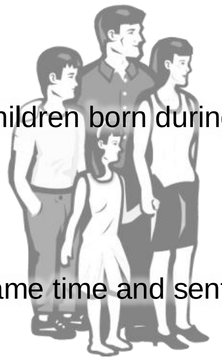
4. Donations

Do you wish us to file your Donation Rebate Claim Form? ☐ **Yes** ☐ **No**

If 'Yes' please bring in all receipts for charitable donations over $5.00. This includes the School donations.

5. Are you entitled to Family Assistance? ☐ **Yes** ☐ **No**



If 'Yes', we MUST have:

a) Full Names, Date of Birth and birth certificates for children born during the year
b) Date any child left school during the financial year
c) A letter from WINZ if you have one

Note:
Wife/Husband – both Tax Returns must be completed at the same time and sent in together in order for Family Assistance to be completed.

6. Other Questions

6.1 Have you taken out a Student Loan during the last 12 months? ☐ Yes ☐ No

6.2 Do you have Loss of Earnings Insurance (Income Protection)? ☐ Yes ☐ No

6.3 Have you been out of New Zealand in the last 12 months and earned income overseas? ☐ Yes ☐ No
If 'Yes' please provide details:

7. Bank Account Number

Please provide us with the details of the bank account to which any rebate can be direct credited. A direct credit from the IRD will ensure that you receive the rebate as early as possible.

Account Number: _ _ - _ _ _ _ - _ _ _ _ _ _ _ _ - _ _ _

Please note that if you are linked to our Tax Agency, your Summary of Earnings and IR3 Tax Pack will be sent to us by the IRD.

Thank you for completing this Checklist. When you have your entire records ready, please contact us to arrange an appointment to come and present your records to us.

Have you remembered to sign the front page?