

## 2024 ANNUAL PERSONAL CHECKLIST

Full Name: \_\_\_\_\_

Postal Address: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_ - \_\_\_\_\_ (Post Code)

Delivery Address: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_ - \_\_\_\_\_ (Post Code)

IRD Number: \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

Date of Birth: \_\_\_\_ / \_\_\_\_ / \_\_\_\_\_

Home Phone #.: (\_\_\_\_) \_\_\_\_\_ - \_\_\_\_\_

Work 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 individual 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.

Entity Name \_\_\_\_\_ (Individual's Name from above)

Entity IRD No. \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

Sign here: \_\_\_\_\_ (signature of person giving authority)

Date: \_\_\_\_\_

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:**

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

**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.

**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

