

# The Tax Lady End of Year Checklist – Page One

Information required to complete Financial Accounts and Tax Returns for the tax year ended 31 March .....



**The Tax Lady**  
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 Wellington 5142  
 PH: 04 526 4866  
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## Your Details:

Name: ..... Address: .....

Phone: ..... Mobile: ..... IRD Number: .....

Email: .....

### Bank Details for IRD Refund

Bank	Branch	Account Number	Suffix

All financial accounts will be sent through our electronic portal this year.

If you would also like a hard copy to be posted to you please tick here.

**POSTED:**

#### Did you receive income from any of the following sources:

No Yes (If yes, please attach details)

- Interest or Dividends .....
- Overseas Pension Plan .....
- Partnerships.....
- Overseas Income (Including Interest) .....
- Self-Employment.....
- Shareholders Salary.....
- Independent Earner Tax Credit Entitlement.....
- PAYE Income.....
- Rental Property .....
- Estates or Trusts.....
- Other Cash Income.....
- Any other untaxed income .....

If yes, complete rental checklist

### General

No Yes

- A. Have you paid premiums on an Indemnity Income Protection Insurance Policy?  
If yes, you should have been provided with annual confirmation of the premiums paid by your insurance company. Please provide a copy of this confirmation.
- B. Have you made any donations during the year?  
If yes, please include all donation rebate receipts and we can claim these for you.
- C. Lump sum payments and pensions from overseas superannuation funds may be taxable income in New Zealand. Please ensure you discuss or advise us of any overseas funds you have or have received benefits from.
- D. Are you a Settlor, a Trustee or a Beneficiary of a New Zealand or Overseas Trust?
- E. Did you receive a Covid-19 wage subsidy, extension or small business loan? Please give the date and the amount received.
- F. If there are any other matters which you feel may be important in determining your tax position that are not included elsewhere, please provide details.

Client Signature: ..... Date: .....