



PERSONAL INCOME CHECKLIST FOR THE YEAR ENDED 31 MARCH 2026

Client Name:

Please complete separate page for each person that requires a personal tax return.

IRD number	Birthday	Bank account number for refunds

	Yes	No
Section 1 - Refunds & Donations		
(a) Do you wish to have any income tax refund direct credited to your account? <i>If "yes", provide bank and account numbers.</i>	<input type="checkbox"/>	<input type="checkbox"/>
(b) Did you make any donations during the year and have a receipt for that donation? <i>If "yes", please email us a copy of the receipt.</i>	<input type="checkbox"/>	<input type="checkbox"/>
Section 2 - Income Details		
(a) Did you receive, or believe you are entitled to receive, Working for Families payments?	<input type="checkbox"/>	<input type="checkbox"/>
(b) Were you a outside NZ for more than 183 days during the income tax year?	<input type="checkbox"/>	<input type="checkbox"/>
(c) Did you receive income from Salary, Wages, Withholding Tax Income or WINZ? <i>If you received withholding income, please provide details of this income. While we receive records from the Inland Revenue Department, often they can be wrong in regards to withholding tax deductions.</i>	<input type="checkbox"/>	<input type="checkbox"/>
(d) Did you receive income from a trust or estate? <i>If "yes", please provide income details.</i>	<input type="checkbox"/>	<input type="checkbox"/>
(e) Did you receive income from overseas? <i>If "yes", please provide income details.</i>	<input type="checkbox"/>	<input type="checkbox"/>
(f) Did you receive income or losses from a partnership? <i>If "yes", attach details of the income, e.g. financial statements, tax certificates etc.</i>	<input type="checkbox"/>	<input type="checkbox"/>
(g) Did you or will you receive shareholder salaries from businesses for which we do not prepare the financial statements? <i>If "yes", provide supporting details, e.g. financial statements, or show who prepared the financial statements and tax returns for those businesses so we can determine the details.</i>	<input type="checkbox"/>	<input type="checkbox"/>
(h) Did you receive income from rents? <i>If "yes", provide details. If appropriate, complete our "Annual Checklist – Investment Properties".</i>	<input type="checkbox"/>	<input type="checkbox"/>
(i) Did you receive income from interest or dividends? <i>If "yes", please provide income</i>	<input type="checkbox"/>	<input type="checkbox"/>
(j) Did you have any other income? <i>If "yes", please provide income details.</i>	<input type="checkbox"/>	<input type="checkbox"/>
(k) Did you receive losses from a look through company (LTC) for which we do not prepare the financial statements? <i>If "yes", provide supporting details, e.g. financial statements, or show who prepared the financial statements and tax returns for those businesses so we can determine the details.</i>	<input type="checkbox"/>	<input type="checkbox"/>
(l) Can you claim expenses e.g. income protection insurance? <i>If "yes", attach details of the claim, e.g. receipts or certificates.</i>	<input type="checkbox"/>	<input type="checkbox"/>
(m) Did you have an interest in a foreign company, unit trust, life insurance policy or superannuation fund? <i>If "yes", attach details of the interest in particular entity.</i>	<input type="checkbox"/>	<input type="checkbox"/>
(n) Do you have cryptocurrency?	<input type="checkbox"/>	<input type="checkbox"/>