

Williams Chartered Accountants

27 Norman Spencer Drive

P O Box 76301

Manukau City

Auckland 2241

Phone (09) 2622552

Personal Tax Return Checklist For 2023

Client: _____

*For the year ended 31 March 2023**The following information may be required to complete your tax return for the year ended 31 March 2023.**If applicable, please tick the appropriate box and provide details or write details in the space provided.***Income:**

- | | | |
|-----|---|--------------------------|
| 1. | SALARY, Wages, Withholding Payments, National Superannuation, Pensions, Accident Compensation etc. Please advise sources of these types of income. | <input type="checkbox"/> |
| 2. | INTEREST - provide certificates from financial institutions or other. | <input type="checkbox"/> |
| 3. | DIVIDENDS - provide details or dividend advices (indicate any deductions for withholding tax and/or imputation credits). | <input type="checkbox"/> |
| 4. | RENTS - advise gross rents received and expenses to be claimed against this income (e.g. rates, interest, repairs, insurance, other). | <input type="checkbox"/> |
| 5. | INCOME FROM ESTATES/TRUSTS - provide details of any income (i.e. interest, dividends, rents, business income or other) and any tax paid by the estate/trust. | <input type="checkbox"/> |
| 6. | PARTNERSHIPS - advise your share of income or losses from partnerships. | <input type="checkbox"/> |
| 7. | SHARE TRADING - if you have been dealing in shares or you have purchased shares for the purpose of selling at a profit, advise full details of such transactions. | <input type="checkbox"/> |
| 8. | PORTFOLIO INVESTMENT ENTITIES - provide distribution summaries received from PIE managers. | <input type="checkbox"/> |
| 9. | OVERSEAS INCOME - provide details of overseas interest, dividends, wages received and evidence of overseas taxation paid. | <input type="checkbox"/> |
| 10. | OTHER INCOME - provide full details. | <input type="checkbox"/> |

Deductions:

- | | | |
|----|--|--------------------------|
| 1. | EXPENSES incurred earning scheduler income (withholding payment income). | <input type="checkbox"/> |
| 2. | EXPENSES incurred for return preparation. | <input type="checkbox"/> |
| 3. | INCOME REPLACEMENT INSURANCE POLICIES - provide details of premiums if applicable. | <input type="checkbox"/> |

Rebates/Tax Credits:

- | | | |
|----|---|--------------------------|
| 1. | DONATIONS - attach all receipts for donations made to approved donee organisations. | <input type="checkbox"/> |
|----|---|--------------------------|

Thank you for completing this questionnaire. Don't forget to sign it.

Bright-line property rule:

Under the bright-line rule, any gain a person derives from disposing of residential property is treated as income of the person if the property is bought on or after 29 March 2018 and is disposed of within five years of acquisition, or if the property is bought on or after 27 March 2021 and is disposed of within ten years of acquisition (unless the property is your family home or another exclusion applies).

Did you sell any property that the bright-line rule may apply to?

Yes / No

Student Loan: Let us know if you have a Student Loan

☐
Working for Families Tax Credits (Family Assistance):

If you are eligible to receive Working for Families Tax Credits, please provide childrens full names, dates of birth and IRD numbers.

<u>Child's Name</u>	IRD Number	Date of Birth	Date Finished School
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Look-through Company income or expenses

If you are a shareholder in a Look-through Company (other than one that we are the accountants for) please let us know. Please provide details of any income or expenses that has been passed on to you from a Look-through company.

Signed: _____ **Date:** _____