

Williams Chartered Accountants

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Personal Tax Return Checklist for 2024

Client: _____

For the year ended 31 March 2024

The following information may be required to complete your tax return for the year ended 31 March 2024.

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.
- 2. INTEREST - provide certificates from financial institutions or other.
- 3. DIVIDENDS - provide details or dividend advices (indicate any deductions for withholding tax and/or imputation credits).
- 4. RENTS - advise gross rents received and expenses to be claimed against this income (e.g. rates, interest, repairs, insurance, other).
- 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.
- 6. PARTNERSHIPS - advise your share of income or losses from partnerships.
- 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.
- 8. PORTFOLIO INVESTMENT ENTITIES - provide distribution summaries received from PIE managers.
- 9. OVERSEAS INCOME - provide details of overseas interest, dividends, wages received and evidence of overseas taxation paid.
- 10. OTHER INCOME - provide full details.

Deductions:

- 1. EXPENSES incurred earning scheduler income (withholding payment income).
- 2. EXPENSES incurred for return preparation.
- 3. INCOME REPLACEMENT INSURANCE POLICIES - provide details of premiums if applicable.

Rebates/Tax Credits:

- 1. DONATIONS - attach all receipts for donations made to approved donee organisations.

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:** _____