

# 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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## Your Details:

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

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

Email: .....

### Bank Details for IRD Refund

Bank	Branch	Account Number										Suffix		

Please advise how you would like to receive your  
Financial Accounts and Income Tax Returns:

POSTED: ..  
ELECTRONIC: ..

#### 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.....	..	..
\$ Barter Card Transactions.....	..	..

If yes, complete rental checklist

## General

Tick if attached

- 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 maybe taxable income in New Zealand.  
Please ensure you discuss or advise us of any overseas funds you have or have received benefits from.
- D. If there are any other matters which you feel may be important in determining your tax position that are not included on previous pages, please note them here:

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