

PERSONAL INCOME TAX RETURN CHECKLIST – 2007

Name:

Tick if included

INCOME

Did you receive any salary, wages, National Superannuation, WINZ benefit, Family Assistance, Accident Compensation etc. Yes/No
Note: Details of this are not required as IRD will provide full details directly to us.

Please provide the following if applicable:

- | | | |
|------------------------|---|--|
| Interest | - all RWT certificates. | <input type="checkbox"/> |
| Dividends | - all dividend warrants (including shares in lieu and bonus issues). | <input type="checkbox"/> |
| Rents | - Details of gross rents received and expenses to be claimed against this income (e.g. rates, interest, repairs, insurance).
- If property has been bought or sold during the year we require copies of settlement statements, sale and purchase agreement and loan documentation. | <input type="checkbox"/>
<input type="checkbox"/> |
| Estate or Trust | - Details of any income and any tax paid by the estate/trust. | <input type="checkbox"/> |
| Partnerships | - Details of any share of income or losses in all partnerships and any tax paid. | <input type="checkbox"/> |
| Overseas Income | - Details of any other overseas sourced income. | <input type="checkbox"/> |
| Other income | - Full details of any other source of income not included above. e.g. Shareholder salaries from entities we do not act for. | <input type="checkbox"/> |

DEDUCTIONS:

Please provide details of the following expenses if applicable:

- | | |
|--|--------------------------|
| - fees incurred for return preparation (other than MJPKF) | <input type="checkbox"/> |
| - expenses against income that has been received with withholding tax deducted | <input type="checkbox"/> |
| - interest incurred in relation to personal loans for business related activities or share purchases | <input type="checkbox"/> |
| - income replacement insurance premiums paid. | <input type="checkbox"/> |

LOSS ATTRIBUTING QUALIFYING COMPANY

If you have been attributed a share of loss, please provide details.

OTHER

Student loan – Please advise details of loan, repayments, etc.

Family Assistance – Higher thresholds for 2007.

You may be entitled to Family Assistance, please provide details of any dependent children, IRD numbers and date of birth.

Rebates - Donations, Childcare, Housekeeper etc:

Please forward the receipts to us so we can calculate your rebate.

For further copies of this questionnaire please contact us or visit our website www.martinjarviepkf.co.nz