

2023 Personal Tax Checklist



TAX EXPERTS LIMITED
CHARTERED ACCOUNTANTS

Period Covered: 1 April 2022 to 31 March 2023

Personal Details

Name of Client _____

Balance Date 31 March 2023 _____

IRD Number _____

Contact Details – to ensure we have up to date records, please complete the following Preferred contact method

Business Phone _____

Fax _____

Home Phone _____

Cell Phone _____

Email _____

Postal Address _____

Home Address _____

Authority to obtain information from Third Parties

TO: Tax Experts Limited
Chartered Accountants
Level 1, 208 Great South Road
Papatoetoe, Auckland 2025

We confirm that Tax Experts Limited, Chartered Accountants are authorised to act on our behalf. We understand that from time to time you will be required to provide, discuss and/or obtain information concerning our affairs in order to carry out work undertaken on our behalf.

Accordingly, we authorise you to obtain, discuss and/or provide information to such third parties as is necessary to carry out your work for us.

Tax Experts Limited, Chartered Accountants are authorised to access, discuss, obtain information for all tax types and to communicate with the Inland Revenue Department (“IRD”) by any method of communication on my behalf and to disclose relevant information regarding my taxation affairs to the IRD.

We authorise the IRD for all purposes under the Privacy Act 1993, the Tax Administration Act 1994 and any other law relating to privacy, do disclose to Tax Experts Limited, Chartered Accountants by any method of communication such information regarding our taxation affairs as Tax Experts Limited, Chartered Accountants may request from time to time.

Further, this authority without limitation applies to the Inland Revenue Department (excluding child support), Income Support, banks, finance companies, investment advisers, insurers, Lawyers, Solicitors, Statistics Department and the Companies Office and specifically to access and update the company details on Companies Office register.

Signature _____

Name _____

Date _____

	Particulars	Yes/No	Details
1	Have you arrived in New Zealand on or after 1 April 2006? (If yes, you may be eligible for temporary exemption from tax on Foreign Income).	Yes/No	
	Income derived in New Zealand		
2	Summary of Earnings / other tax deducted income These forms summarise your New Zealand earnings which have tax deducted and the Inland Revenue usually forwards them to us as your tax agent. Should you have received any of these please forward a copy to us.	Yes/No	
3	Interest Received Attach details of notices/statements including details of withholding tax deducted.	Yes/No	
4	Dividends Received Attach details – include dividend received from Power Company	Yes/No	
5	Trust / Estate Income Attach details of any income received from Trusts/Partnerships for the year.	Yes/No	
6	Rental Income Please attach full details of the address of the property, rent received, number of months let or available to let and any expenses incurred (bank fees, interest, legal fees, rates, repairs & maintenance etc).	Yes/No	
7	Other Income Please attach full details of any other income (e.g. royalties, share or partnership, overseas income, income from shares or property dealing, business or self employed income, shareholder employee salary).	Yes/No	
8	Company Shareholder Salary / LTC Company Please advise name/names of companies your are expecting to receive a salary or loss from.	Yes/No	

	Particulars	Yes/No	Details
9	<p>Provisional Tax</p> <p>If you are a provisional taxpayer and are aware of any matters that may cause your 2023 residual income tax to be significantly different from your 2022 position, please advise details.</p>	Yes/No	
	Other Information		
10	<p>Student Loan</p> <p>Do you have a student loan?</p> <p>Have you made any voluntary repayments?</p>	Yes/No	
	Tax Rebate Entitlement		
11	<p>Charitable Donations</p> <p>Attach Original receipts, Receipts must be in your name and not in the Company/Trust name.</p>	Yes/No	