

2026 Tax Return Only Checklist

Individual Names: _____

Engagement

I/We instruct McIntyre Dick & Partners to prepare my/our taxation returns for the 2026 financial year. I/We undertake to supply all information necessary to carry out such services (as per the engagement) and will be responsible for the accuracy and completeness of such information.

Your services are not intended to, and accordingly will not result in the expression by you of an opinion on the financial statements or tax returns summaries in so far as third parties are concerned, or the fulfilling of any statutory audit requirements.

Authority to Obtain Information

You are hereby authorised to communicate with the appropriate bankers, solicitors, finance companies, Inland Revenue, ACC and other persons or organisations to obtain such further information as you may require in order to carry out the above engagement.

This authority continues until such time as it is revoked by me in writing.

Signatures _____

Date _____

Tax Refunds Direct Credited

Inland Revenue now direct credit refunds to your bank. Please advise the bank account you wish refunds (if any) to go into.

Account Name _____

Bank Account Number _____

Key Issues you wish to discuss when we meet

Major Transactions we need to know about

Contact Details that have changed so we can update our records

Personal Tax Information

Tick

For each individual tax return also required please provide the following information

1. Salary, wages , NZ Superannuation, withholding income - We will receive direct from Inland Revenue	N/A
2. Other income received with no tax deducted	
3. Interest received and RWT certificates issued by banks and financial institutions	
4. Dividends received - attach dividend advices	
5. Rental property income - please print and complete schedule from our website	
6. Share/bond purchases or sales - attach documentation	
7. PIE / Kiwisaver income - attach PIE tax statements	
8. Investment portfolios or statements showing values at balance date and details of any purchases / deposits or sales / withdrawals	
9. Cryptocurrency – details of all coins purchased and sold during the year e.g. quantity of coins sold/ purchased and value	
10. Overseas income or overseas investment income	
11. All donation receipts	
12. Income or losses from an estate, trust, partnership or Look-through company that we do not prepare accounts for	
13. Deductible expenses - attached details of expenses incurred in earning income e.g. loss of income insurance, interest on loans used to acquire investments	
14. Student loan tick if you have a student loan	
15. Working for families - please print and complete schedule from our website	
16. Do you want us to prepare your children's tax returns? If so, provide the above information for them	