

# McIntyre Dick

## 2023 Tax Return Only Checklist



Individual Names: \_\_\_\_\_

### Engagement

I/We instruct McIntyre Dick & Partners to prepare my/our taxation returns for the 2023 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. <b>Salary, wages</b> , NZ Superannuation, withholding income - We will receive direct from Inland Revenue  | N/A |
| 2. <b>Other income</b> received with no tax deducted  |     |
| 3. <b>Interest received</b> & RWT Certificates issued by banks and financial institutions   |     |
| 4. <b>Dividends received</b> - attach dividend advices  |     |
| 5. <b>Rental property income</b> - please print and <b>complete schedule</b> from our website   |     |
| 6. <b>Share/bond purchases or sales</b> - attach documentation  |     |
| 7. <b>PIE / Kiwisaver</b> income - attach PIE tax statements  |     |
| 8. <b>Investment portfolios</b> or statements showing values at balance date and details of any purchases / deposits or sales / withdrawals                           |     |
| 9. <b>Overseas</b> income or overseas investment income   |     |
| 10. All <b>donation</b> receipts  |     |
| 11. Income or losses from an <b>estate, trust, partnership or Look-through company</b> that we do not prepare accounts for  |     |
| 12. <b>Deductible expenses</b> - attached details of expenses incurred in earning income e.g. loss of income insurance, interest on loans used to acquire investments |     |
| 13. <b>Student loan</b> tick if you have a student loan   |     |
| 14. <b>Working for families</b> - please print and <b>complete schedule</b> from our website  |     |
| 15. Do you want us to prepare your <b>children's tax returns</b> ? If so, provide the above information for them  |     |