

# Individual Checklist



Client name: \_\_\_\_\_  
 Balance date: \_\_\_\_\_  
 Date: \_\_\_\_\_

To: The Business Results Group Limited

## Terms of Engagement

I hereby instruct you to prepare our Taxation Returns for the 2011 year. I undertake to supply all information necessary to carry out such services, and will be responsible for the accuracy and completeness of such information. You are hereby authorised to communicate with my bankers, solicitors, finance companies and all government agencies to obtain such information as you require in order to carry out the above assignments.

You are to represent me/us as my/our tax agent. All income tax returns will be signed by me/us however you are authorised to sign any other taxation return on behalf of myself/ourselves or any of my/our associated entities.

Signature \_\_\_\_\_ Date \_\_\_\_\_

## Records Required

<b>Wages/National Superannuation/Benefits</b>			
Please provide us with the names of any organisations you have received the following from:			
• Wages	• National Superannuation	<input type="checkbox"/>	
• ACC payments	• Any other benefits	<input type="checkbox"/>	
<b>Student Loan</b>			
Do you have a student loan? <input type="checkbox"/> Yes <input type="checkbox"/> No		If so, provide your latest statement from IRD <input type="checkbox"/>	
<b>Interest and Dividends</b>			
• Annual advice notice showing withholding tax deducted.		<input type="checkbox"/>	
• Advice slips for any dividends taken as bonus shares		<input type="checkbox"/>	
<b>Partnerships, Trusts, Estates and Companies</b>			
Supply details of income received			<input type="checkbox"/>
<b>Overseas</b>			
• Supply details of overseas interest, dividends, wages received and taxation paid		<input type="checkbox"/>	
• Provide details of any overseas investments held at any time during the financial year		<input type="checkbox"/>	
• Attach all of your investments advisor's reports		<input type="checkbox"/>	
<b>Any Other Income</b>			
Attach details:			
• Income Replacement Insurance Policy – provide details of premiums and claims		<input type="checkbox"/>	
• Loss Attributing Qualifying Company – if you have been allocated a share of a loss other than from a company that we are aware of, please provide details		<input type="checkbox"/>	
<b>Donations, Housekeeping and Childcare Tax Credits</b>			
Do you want us to complete your rebate claim form? <input type="checkbox"/> Yes <input type="checkbox"/> No		If so, attach receipts <input type="checkbox"/>	
<b>Working for Families Tax Credits and Parental Tax Credit</b>			
• Supply details of all dependent children who live with you (list below)		<input type="checkbox"/>	
• If you have received Working for Families Tax Credits during the year, supply the certificate issued to you by IRD, detailing the amounts		<input type="checkbox"/>	
• Provide details of any child support or maintenance payments made or received		<input type="checkbox"/>	
child's name	IRD no.	date of birth	date left school