**Information required to prepare your Personal income tax return**

(Note questions apply to period 1 April 2014 to 31 March 2015)

If Yes attach details

1. Did you receive any Interest Withholding Tax certificates? Yes  No

(these are supplied by your bank shortly after 31st March)

1. Did you receive any Dividend Advice notices? Yes  No
2. Do you have any funds in a P.I.E. (Portfolio Investment Entity)? Yes  No
3. Did you receive income from any other entities  
   e.g. a Partnership, Estate or Trust or loss from LTC? Yes  No

*(Where the tax return is not prepared by* D’Mello Chartered Accountants*)*

If **yes**:

Name of Partnership/Estate/Trust/LTC

IRD Number

Amount of Income or Loss

Details of any interest cost to

invest in other entities

1. Did you receive any personal rental income? Yes  No

If **yes** complete the attached **schedule 1**

1. Did you receive any self-employment income? Yes  No

If **yes** complete attached **schedules 2 – 9**

**Not required if the “Business Questionnaire” is completed separately**

1. Did you receive any other income? Yes  No

If **yes** attach details of income received from any other sources

1. Do you have any overseas investments including super schemes? Yes  No
2. Is there any other information you think may be relevant? If **yes** attach details Yes  No
3. Do you have a student loan? Yes  No
4. Do you think that you maybe eligible for Family Support or Working for Families Yes  No

If **yes**, please complete attached **schedule 10**

1. Do you pay Income Protection Insurance? Yes  No

If **yes**:

* + Provide copy of insurance company letter advising deductible portion.
  + Advise whether paid from business. Yes  No

1. Did you borrow money to buy company shares? Yes  No

If **yes**, please provide details of interest paid.

1. Do you think your income between $24,000 to $48,000? Yes  No   
   If **yes**, please provide the number of weeks when more   
   than 20 Hours were worked as you may be entitled to IETC Credit weeks
2. Do you wish us to prepare your personal rebate return? Yes  No   
   If **yes**, please provide original donation receipts and the bank account you wish Inland Revenue to credit

rebate to:

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Account Name: |  | | | | | | |
| Bank account Number: |  | - |  | - |  | - |  |