

ERSKINE-SHAW ACCOUNTANTS LIMITED

ACCOUNTANTS & BUSINESS ADVISORS

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INDIVIDUAL INCOME - INFORMATION SHEET

FULL NAME IRD NO:
FULL NAME OF SPOUSE IRD NO:
ADDRESS EMAIL:
..... BALANCE DATE:

INCOME

Enclose Personal Tax Summary Form (obtained from IRD) for wages, salary, Directors Fees, National Superannuation, Accident Compensation Claim, Family Assistance. This will come directly to us if we have previously prepared your return.

INTEREST, DIVIDENDS AND OVERSEAS INCOME

Please attach all certificates and notices for the following:

- | | | |
|---|---|----------|
| A | a) Interest earned in NZ | Yes / No |
| | b) Interest earned Overseas | Yes / No |
| B | Dividends NZ Companies | Yes / No |
| C | Investments in foreign Company shares* | Yes / No |
| | a) Australian shares* | Yes / No |
| | If YES, the Australian exemption might apply. Ask us for a copy of our "Australian share market exemption" questionnaire to check if your Australian shares are exempt from the new regime. If they are exempt, you will only need to provide us with dividend details. | |
| | b) Other foreign shares* | Yes / No |
| | If YES, ask us for a copy of our schedule Z so we can gather the information we need. | |
| D | Investments in foreign unit trusts* | Yes / No |
| | If YES, ask us for a copy of our schedule Y to see if you qualify for the Australian exemption. If you do not qualify for the Australian exemption, you will also need our schedule Z. | |
| E | Investments in foreign superannuation of pension funds* | Yes / No |
| | If YES, ask us for a copy of our schedule Z so we can gather the information we need. | |
| F | Investment in other kind of foreign equity scheme* | Yes / No |
| | If YES, ask us for a copy of our schedule Z so we can gather the information we need. | |

* If your total investments (as an **individual**), for the whole year, in categories C to F above, when added together, have cost you less than \$50,000, you will only have to give us details of the income you have derived from them. If they cost more than \$50,000, you might still be outside the new regime. Ask us for a copy of our schedule X.

OTHER INCOME (attach a schedule with details)

- Rents
- Partnership, Trust or Estates
- Overseas Income
- Other

WORKING FOR FAMILIES

The Inland Revenue Department will calculate your Working for Families entitlement.
If you are, or feel you may be entitled to assistance please notify us.
We will then ensure you are given the appropriate forms to fill in.

Yes / No

REBATES

DONATIONS

Enclose receipts for donations to schools, churches and charitable organisations.
Minimum allowance donation \$5.00

CLIENTS SIGNATURE:

DATE:

DATE RECEIVED & INITIALS REVIEWER: