



Your Information Checklist FOR TAX RETURNS

Not sure what to do at the end of your financial year?

As a business owner, the end of the financial year is usually the catalyst for a number of important activities, on top of day to day tasks. As a result, it can often be a stressful time.

To alleviate that stress we have put together **Your Information Checklist** identifying the **information** required by your accountant. And don't forget, if you're not sure what you should be doing or what information your accountant needs, your **Client Manager** is just a call away. We also have **Business Consultants** on hand to provide general business advice and strategic support.

**Please provide the following information for the financial year as at balance date.
This information should include any income sources in NZ or abroad**

- A share of profits or losses (from any entity we do not act for)
- Rental income
- Pensions
- Lump sums received
- Shares retained, purchased or sold
- Interest (provide tax withholding certificates)
- Dividends (provide dividend advice notices)
- Investments (provide investment statements)
- Receipts for donations and school fees

How do I get the information to you?

You can upload files to The Portal.

Don't have access or want to know more?
Give us a call on 407 7117

You can also provide hard copies or email your files to your Client Manager.

Working for Families:

If you are eligible for Working for Families please complete the Working for Families checklist available on our website or upon request

Rental Properties:

If you have a rental property please complete the Rental Properties checklist available on our website or upon request

Business Owner:

If you own a business please complete the appropriate Business Owner checklist available on our website or upon request