

SPG ACCOUNTING LTD
Personal Income Tax Checklist
For the Year Ended 31 March 2010

Client Name:

Client Name:

		Client 1	Client 2
1	Did you earn any wages, salaries or NZ superannuation during the year? SPG Accounting Ltd will obtain your Summary of Earnings directly from Inland Revenue.	Y/N	Y/N
2	Did you earn any interest income during the year? If yes, please attach your interest details for any bank accounts or investments held during the year.	Y/N	Y/N
3	Did you earn any overseas income (interest dividends, rental income, other income) during the year? If yes, please attach all your statements.	Y/N	Y/N
4	Did you earn any dividends during the year including your power dividend? If yes please attach all your dividend slips/advices.	Y/N	Y/N
5	Did you earn any rental income ? If yes, please complete a Rental Property Checklist.	Y/N	Y/N
6	Did you earn any other income during the year, such as commission sales or odd jobs? If yes, please attach the details.	Y/N	Y/N
7	Are you a partner, shareholder or, beneficiary in a business/investment/trust for whom we are not the accountants? If yes, please provide details.	Y/N	Y/N
8	If you earned withholding tax income or self-employment income which we are not preparing financial statements for, you may be able to claim expenses against this income. Do you wish to claim expenses? If yes, please provide details	Y/N	Y/N
9	Do you wish to claim home office expenses against any self-employment income (for which we are not preparing financial statements for)? If yes, please complete a Home Office Expenditure Claim Form.	Y/N	Y/N
10	Did you make any donations to charities during the year? If yes, please attach valid donation receipts	Y/N	Y/N
11	Did you pay for a housekeeper or childcare during the year while you were working? If yes, please provide details of payments made.	Y/N	Y/N
12	Do you have Loss of Income Protection Insurance ? If yes, please attach the invoices and details.	Y/N	Y/N
13	Do you have a student loan ? If yes, please attach your student loan statements and information. If there is has been overpayment of your student loan , do you want it left to reduce your student loan or refunded back to you?	Y/N	Y/N

- 14 Do you have **dependent children**? Y/N Y/N
 If yes, are you the primary caregiver for them? Y/N Y/N
 If yes, have you received family assistance during the year? Y/N Y/N
 If yes, have you provided the letter from Social Welfare / IRD Y/N Y/N
 If you wish us to check your family's eligibility for family assistance please list the names, ages and IRD numbers of your children below:

Name	IRD Number	Date of Birth

Did any of the children leave school through the year or turn 18? Y/N Y/N
 If yes, please advise details.

To check your family's eligibility for family assistance we need to know your partner's annual gross income. Please give your partner's annual gross income (or provide a copy of your partners 2010 income tax return or personal tax summary). \$_____

If you wish to apply for family assistance but your children do not have IRD numbers, please supply us with copies of their birth certificates & we will apply on your behalf.

I/We hereby instruct you to prepare my/our financial statements and taxation returns for the year/period ending 31 March 2010. I/We undertake to supply all information necessary to carry out such services, 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 in so far as third parties are concerned, or in the fulfilling of any statutory audit requirements. You are hereby authorised to communicate with my/our bankers, solicitors, finance companies and all government agencies to obtain such information as you require in order to carry out the above assignments.

I/We also accept that SPG Accounting Ltd has the right to charge interest on overdue accounts at the rate of 2% per month, and that all accounts are due for payment by the 7 days following invoice date. The charging of such interest will be at the discretion of SPG Accounting Ltd. I/We accept that any collection costs incurred by SPG Accounting Ltd will be fully recoverable from me/us.

Signed: Dated/...../.....

Signed: Dated/...../.....