



Name: _____

Please complete:

Home telephone: _____

Office telephone: _____

Mobile telephone: _____

E-mail address: _____

2026 Personal Tax Checklist

Information required for your personal income tax return

Terms of Engagement

I hereby instruct you to prepare my/our tax returns for the 2026 financial year. 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. You are hereby authorised to communicate with my bankers, solicitors, finance companies, all government agencies and other persons or organisations 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.

I/We also accept that you have the right to charge interest on overdue accounts at the rate of 1.5% per month, and that all accounts are due for payment by the 20th of the month following invoice date. The charging of such interest will be at your discretion. I/We accept that any collection costs you incur will be fully recoverable from me/us.

Signature _____

Date _____

Personal tax information

Tick

For each individual tax return also required please provide the following information

Personal tax information	Tick
1. Salary, wages, NZ superannuation, withholding income - we will receive direct from Inland Revenue	N/A
2. Other income received with no tax deducted	
3. Interest received and RWT certificates issued by banks and financial institutions	
4. Dividends received - attach dividend documentation	
5. Rental property income - please complete rental checklist	
6. Share/bond purchases or sales - attach documentation	
7. PIE / Kiwisaver income - attach PIE tax statements	
8. Investment portfolios or statements showing values at balance date and details of any purchases / deposits or sales / withdrawals	
9. Overseas income including overseas investment income	
10. All donation receipts	
11. Income or losses from an estate, trust, partnership or look-through company that we do not prepare accounts for	
12. Deductible expenses - attached details of expenses incurred in earning income e.g. loss of income insurance, interest on loans used to acquire investments	
13. Student loan - tick if you have a student loan	
14. Do you require us to prepare your children's tax returns? If so, provide the above information for each child	