



THUMP TAX LTD

2019 Individual Checklist

Surname		First Names	
IRD No.		Email	
Work/Home Ph		Cell phone	
Address			

Declaration

To: Frances Cartwright – Thump Tax Ltd

Please complete my Tax return based on the information supplied in this checklist. I accept responsibility for the accuracy and completeness of such information. You are to represent me as my tax agent. You are therefore authorised to sign any taxation return on behalf of myself or any of my associated entities. Generally, these arrangements will continue in effect from year to year, unless we agree to change them.

Signature _____ Date _____

Residency		
Have you ever lived outside New Zealand?	<input type="checkbox"/>	
If yes, how long have you lived outside NZ?	<input type="checkbox"/>	
And when did you arrive in NZ and become a resident?	<input type="checkbox"/>	
If you believe you are not a NZ resident for tax purposes, please write a note to us to explain why.		

Income and Investments	×	Comments
Do you have: <ul style="list-style-type: none">• Salary/Wages taxed at source and recorded on an IRD summary of earnings• NZ Interest or Dividends – if yes, provide certificate	<input type="checkbox"/> <input type="checkbox"/>	



<ul style="list-style-type: none"> • Trust income <input type="checkbox"/> • Partnership income – Active <input type="checkbox"/> Partnership income – Passive e.g. rental <input type="checkbox"/> • Shareholder’s/director’s income from a company <input type="checkbox"/> Company name Company name Does your company receive 80% or more of its income from one source from personal services or ore or more sources which are related? E.g. 2 companies having much the same shareholding. • Profit earned as a Sole Trader <input type="checkbox"/> • Rental Income <input type="checkbox"/> • Do you have any overseas investments <input type="checkbox"/> • Other income if any (supply full details) <input type="checkbox"/> 	
Expenses	
Do you have a claim for Look Through Company losses? <input type="checkbox"/> Losses brought forward: please include IRD notice <input type="checkbox"/> Income protection insurance, if not claimed in business. <input type="checkbox"/>	
Independent Earner Tax Credit	
If your income is between \$24,000 and \$48,000 for the tax year, this tax credit may be available. To assess your eligibility, need to know: <ul style="list-style-type: none"> • Are you a New Zealand Tax resident <input type="checkbox"/> • Are you or your partner entitled to a working for families tax credit, or receiving an overseas equivalent <input type="checkbox"/> • Do you receive an income-tested benefit <input type="checkbox"/> • Do you receive a Veteran’s pension, NZ Superannuation or an overseas equivalent <input type="checkbox"/> 	
Working For Families	
Do you qualify for Working for Families tax credits? <input type="checkbox"/>	
Donations Tax Rebates	
Have you got any rebates to claim? <input type="checkbox"/> If yes, have you sent your rebate claim form to IRD? <input type="checkbox"/> Do you want me to complete your rebate claim form? <input type="checkbox"/>	
Bank Account Number	
This will speed up any tax refund process <input type="checkbox"/>	

Thank you for completing this checklist