

# EASTWOOD BOURKE LIMITED

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*Solutions for Business*

Website: [www.eastwoodbourke.co.nz](http://www.eastwoodbourke.co.nz)



CHARTERED ACCOUNTANTS  
AUSTRALIA + NEW ZEALAND

13<sup>th</sup> April 2019

Dear

## **TAX RETURN CHECKLIST 31<sup>st</sup> March 2019**

Enclosed is a tax return checklist. The checklist is an important first step to:-

- **Allow you to give us the details we require.**
- **Remind you of your responsibility to provide accurate and complete information.**

Please use this checklist to help you provide us with all relevant tax return information necessary for us to complete your tax return.

Please provide this information as soon as convenient.

If you need help please feel free to ring or email me, or Joanna Gundersen ([jo@eastwoodbourke.co.nz](mailto:jo@eastwoodbourke.co.nz))

Yours faithfully

**GERARD EASTWOOD**  
**EASTWOOD BOURKE LIMITED**

Email: [gerard@eastwoodbourke.co.nz](mailto:gerard@eastwoodbourke.co.nz)

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# TAX RETURN CHECKLIST

Year Ended 31 March 2019

To complete your tax return accurately we require the following information:

## INCOME

- INTEREST & DIVIDENDS:** dividend and interest advice slips showing gross income earned and tax paid (personal & jointly held investments).
- OTHER INCOME** (attach a schedule with details including expenses where applicable):

* Rents	* Overseas Income	* Partnership, Trusts or Estates	* Other
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## TAX CREDITS

- Independent Earner Tax Credit (Below \$48,000 Taxable Income):**  
Are you a NZ Resident and did you work for 20 hours or more per week for the whole year and/or received earnings related compensation, paid parental leave or a sickness benefit?

## WORKING FOR FAMILIES TAX CREDITS

- Has the number of children you care for changed during the year? If so, please supply details (names, dates of birth, dates of starting or ceasing care).
- Have you received Working For Families Tax Credit Payments during the year?
- Have you worked for 20 or more hours per week, or have you and /or your partner worked for 30 or more hours per week? If so, please provide the number of weeks involved.
- Have you received paid parental leave or income-tested benefits during the year? If so, provide details.

### **IMPORTANT:**

*The definition of "Family Income" for eligibility for Working For Families Tax Credits changed in April 2012, and may affect your entitlement to these tax credits. To complete your returns correctly you need to advise us of:*

- **Other Receipts over \$5,000 pa** (Taxable or not) received by the family for day to day living cost.
- **Tax Exempt Income, PIE Income, & Payments into the Farm Income Equalisation Scheme.**
- **Pensions & Annuities** - 50% of amounts received from life insurance policies or superannuation funds.
- **Fringe Benefits** - value of benefits where you own 50% or more of a company must be added to Family Income.
- **Attributable Trustee Income** - all Trustee Income (ie not allocated to beneficiaries) where you are a settlor is added to family income. This includes income from trading & investment & from a company controlled by the Trust.
- **Childrens Passive Income (if over \$500 each child)**, including Interest, Dividends, Rent, Trust Income.

## FAMILY SUPPORT (Child Support)

- Have you received family support from WINZ or a previous partner? If so, how much?
- Have you paid family support to WINZ or a previous partner? If so, how much?

## STUDENT LOANS

- Do you have an obligation to repay a student loan?

## OVERSEAS SHARES

- Did you have overseas shares that cost more than \$50,000NZ as at 31<sup>st</sup> March 2019? If so, please supply details.

## DONATIONS REBATE CLAIM:

- Donations:** Please provide all receipts for donations made during the tax year.