

INDIVIDUAL TAX RETURN
INFORMATION SHEET

2019

CLIENT NAME: _____

Please tick the relevant boxes and supply statements and information as applicable.

INCOME

What types of income have you received during the year?

- Wages, Salaries or With-holding income with tax deducted? *(We will confirm these details from the IRD)*
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INVESTMENT INCOME

Interest and Dividend Statements for:

- Term Deposits
- Shares
- Overseas Income
- Other
- Bank Interest/RWT Certificates

Details of annual transactions for:

- Savings Accounts
- Investment Accounts & Term Deposits
- Foreign Bank Accounts
- Overseas Pensions
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OTHER INCOME

Please attach all details/information relating to income from:

- Business
- Farming
- Rents
- Partnership, Trusts or Estates
- Other (Overseas Income)
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PERSONAL REBATES

- Donation receipts
- Bank Account Details (if a refund is due)

