



2010 PERSONAL TAX RETURN CHECKLIST

WBB Client Group Name: _____

Provided to us last year		Taxpayer #1	#2	#3	#4
	Please complete details on this form where possible.	YES <input checked="" type="checkbox"/>	NO <input checked="" type="checkbox"/>		
<input type="checkbox"/>	1. Did you receive income from wages/salaries/national superannuation/WINZ?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	2. Did you receive income from employment with withholding tax deducted?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<i>If yes, please complete our BUSINESS CHECKLIST.</i>				
<input type="checkbox"/>	3. Did you have a share of partnership income/loss?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Does WBB prepare the accounts for this partnership?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Name of Partnership _____				
<input type="checkbox"/>	4. Did you receive a shareholder salary with no tax deducted, or own shares in a QC/LAQC?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Does WBB prepare the accounts for this company?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Name of Company _____				
<input type="checkbox"/>	5. Have you received any interest or dividend income <i>If yes, please attach interest and dividend certificates.</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	6. Do you have any investments in shares etc? <i>If yes, please attach details.</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	7. Did you receive any income from an Estate or Trust?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Does WBB prepare the accounts for this Estate/Trust?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Name of Estate/Trust _____				
<input type="checkbox"/>	8. Do you have any overseas bank accounts, or any interest in overseas companies, unit trusts, life assurance policies or superannuation funds, or receive any other form of overseas income? If yes, please attach details.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	9. Did you receive any rent from properties? If yes, please provide the following information:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/> Copies of solicitors statements, purchase/sale agreements if property purchased/sold during the year.				
<input type="checkbox"/>	<input type="checkbox"/> Summary of rent received and expenses paid relating to the property				

- Details of mortgage interest paid (loan summary, or loan bank statements).
- Details of repairs to the property
- Copy of valuation (govt or registered) if the property was purchased this year, including rating valuation

	Taxpayer #1	#2	#3	#4
<input type="checkbox"/> 10. Did you receive any other income from any other source? If yes, please attach details. _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> 11. Did you pay premiums for income protection insurance? <i>If yes, please attach a copy of the confirmation letter from your insurer, of the premiums paid.</i> _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> 12. Do you have a student loan? <i>If yes, please attach a copy of the latest Statement of Account received from IRD.</i> _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> 13. Did you make any donations or housekeeper payments? <i>Please attach receipts.</i> _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

OTHER INFORMATION

If you have any other information, which you feel may be relevant to, or included in your tax return that has not been included in the above questions, please attach full details.

I confirm that I have examined all matters mentioned above and provided you with all relevant details as requested. I accept responsibility for the accuracy and completeness of the information supplied above to be used in the preparation of my tax return. I confirm that the information supplied in this checklist is accurate and complete in all respects.

(Principal client signature)

(Date)