



TAX EXPERTS LIMITED
CHARTERED ACCOUNTANTS

PERSONAL TAXATION CHECKLIST FOR THE YEAR ENDED 31ST MARCH 2026

PERSONAL DETAILS

NAME	
IRD NUMBER	
HOME PHONE NUMBER	
EMAIL ADDRESS	
MOBILE NUMBER	
POSTAL ADDRESS	
PHYSICAL ADDRESS	

SIGNATURE	
NAME	
DATE	

Information for Preparing your Annual Accounts

01st April 2025 to 31st March 2026

These questionnaires are extremely important. Our compilation of your personal tax returns is only based on the information that you provide and hence please provide as much details as you can.

PARTICULARS	YES/NO	DETAILS
1. Have you arrived in New Zealand on or after 1 April 2006? (If yes, you may be eligible for temporary exemption from tax on Foreign Income).		
Income derived in New Zealand		
2. Summary of Earnings / other tax deducted income These forms summarise your New Zealand earnings which have tax deducted and the Inland Revenue usually forwards them to us as your tax agent. Should you have received any of these please forward a copy to us.		
3. Summary of Earnings / other tax deducted income These forms summarise your New Zealand earnings which have tax deducted and the Inland Revenue usually forwards them to us as your tax agent. Should you have received any of these please forward a copy to us.		
4. Dividends Received Attach details – include dividend received from Power Company		
5. Trust / Estate Income Attach details of any income received from Trusts/Partnerships for the year.		
6. Rental Income If you have any rental income, please fill out the rental income questionnaire		
7. Share Trading/Crypto Income If you have any Share Trading income or any income from Crypto, please send us the details separately		
8. Other Income Please attach full details of any other income (e.g. Royalties, Share or partnership Income, Income from shares or property dealing, other business or self-employed income, shareholder employee salary or Wage Subsidy Received). Please provide details		
9. Company Shareholder Salary / LTC Company Please advise name/names of companies your are expecting to receive a salary or loss from.		

10.	Provisional Tax If you are a provisional taxpayer and are aware of any matters that may cause your 2026 residual income tax to be significantly different from your 2025 position, please advise details.		
Other Information			
11.	Student Loan Do you have a student loan? Have you made any voluntary repayments?		
Tax Rebate Entitlement			
12.	Charitable Donations Attach Original receipts, Receipts must be in your name and not in the Company/Trust name.		
13.	Do You have any Income Protection Insurance		
14.	OVERSEAS INCOME		
	OVERSEAS SALARY/CONSULTANCY FEES Please provide details	\$	
	OVERSEAS RENTAL INCOME Please complete separate Property Investment Questionnaire	\$	
	OVERSEAS INTEREST RECEIVED Please provide interest certificates	\$	
	OVERSEAS DIVIDENDS RECEIVED Please provide dividend statements	\$	
	OVERSEAS SHARES/SUPERANNUATION/LIFE INSURANCE POLICIES Please provide details including:		
	(A) Cost of investments (including premiums and other contributions) Purchase/contribution and sale/distribution details	(A) \$	
	(B) Market values as at 01/04/2025 and 31/03/2026 Investment advisor reports and their contact details	(B) \$	