

Blackmore, Virtue & Owens (BVO) is authorised to compile an individual income tax return for the following based on the information provided.

**Year Ended** **20**

Name		
Home Address		
Postal Address		
Home Telephone	Home Fax	Mobile Phone
Business Telephone	Business Fax	
Email		
IRD Number		

#### Acknowledgement of Responsibility

It is acknowledged that the income tax return to be compiled will be based on the information supplied and that the accuracy of the information and ultimately the accuracy of the return is the tax payer's responsibility. This responsibility is imposed by the Income Tax Act 2007 and cannot be delegated to BVO. Accordingly the client must be satisfied as to the completeness and accuracy of the income tax return before signing the declaration thereon.

It is further acknowledged that where there are alternative courses of action BVO can only advise on those alternatives and that the decision taken is the client's. BVO does not and cannot warrant the outcome of any tax or commercial position suggested or taken.

#### Privacy Act

BVO is authorised to obtain any additional information required to compile this tax return and all third parties, including solicitors, advisers, bankers and other financial institutions, are hereby authorised to provide any such information requested by BVO

#### Authority to Act as Agent

We hereby give Blackmore Virtue & Owens, Chartered Accountants, the authority to link any tax account type and activity in respect of us to their agency list with the Inland Revenue Department.

Signed: \_\_\_\_\_ Dated: \_\_\_\_\_  
(By the taxpayer or authorised person)

#### Instructions

Use the right hand columns to note whether or not each item is relevant, and if so to confirm that the necessary information has been provided. Attach that information to this form. Please ask if you require clarification on any points.

#### Note

New Zealand residents are obliged to return their income from New Zealand and overseas sources. Non-residents are required to return only their New Zealand sourced income.

### Your Chartered Accountants and Business Advisors

#### BLACKMORE VIRTUE & OWENS

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#### DIRECTORS

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Alexander Houghton BBus, CA

#### PARTNERS

AR Owens Limited

DM Virtue Limited



**GGI**  
INDEPENDENT MEMBER

**INDIVIDUAL NON BUSINESS TAX RETURN CHECKLIST – 31 MARCH (or alternative balance date)**

ITEM	WHAT WE NEED	TICK IF APPLIES	TICK IF SUPPLIED
<b>Wages and Salaries</b>	A summary of earnings under PAYE to confirm the information received directly from Inland Revenue. In the case of withholding payments received, are they GST inclusive or exclusive?		
<b>Interest Received</b>	Provide detail of source and amount received. Bank and other lender advice slips are to be provided to show withholding tax paid on your behalf. Include any joint investments and specify as such.		
<b>Dividends Received</b>	Provide detail of source and amount received. Dividend and bonus issue advice slips are to be provided to show imputation credits and withholding tax paid on your behalf. Include any joint investments as well as any dividends from your electricity supplier.		
<b>Rental Income</b>	Refer to BVO's financial statements checklist if financial statements are prepared for the rental activity. Otherwise summarise rents received and costs incurred. The following guide may be useful. Cost of house: - Land ) if not \$ _____ - Improvements ) previously \$ _____ - Total ) supplied \$ _____ Interest paid on mortgage \$ _____ Principal paid off mortgage \$ _____ Electricity paid \$ _____ Gas paid \$ _____ Insurance paid \$ _____ Repairs paid \$ _____ Maintenance paid \$ _____ Rates paid \$ _____ Water paid \$ _____ Travel paid \$ _____ Advertising paid \$ _____ Any other expenses paid \$ _____ Total rents received \$ _____		
<b>Shareholder Salary, Directors Fees, Partnership Income or Trust Distributions</b>	Where BVO does not prepare the financial statements for the company, partnership or trust, confirmation of income from that entity's accountant.		
<b>Loss of Earnings Insurance Premiums</b>	Premiums paid in respect of policies intended to provide for benefits during times of injury or sickness, where the benefits are the lower of a specified sum or say 80% of average weekly income.		
<b>Extended Disablement Insurance Premiums</b>	Premiums paid in respect of policies intended to provide weekly income in the event of some disablement which prevents you carrying out your normal occupation.		
<b>Family Assistance</b>	Some principal caregivers may be entitled to family assistance. To consider your position, provide children's names, dates of birth and IRD numbers. If a child left school during the year, the date on which they left.		

<b>Charitable Donations</b>	Receipts from charities for donations made.		
<b>Bank Account Inland Revenue Should Credit</b>	For rebate to be direct credited, provide bank, branch, account name and full account number.		
<b>Family Circumstances</b>	If you married, separated or otherwise changed your family circumstances during the year, advise of change.		
<b>Child Support Payments</b>	Advise any amounts received or paid.		
<b>Maintenance Payments</b>	Advise any amounts received or paid.		
<b>Full Time Employment</b>	Were you in full time employment during the year (20 hours a week or more) and earned income from that work? YES / NO If yes, for how many weeks of the year?		
<b>Student Loan</b>	Details if you are a current recipient of a student loan.		
<b>Overseas Pensions</b>	Amount received for the financial year in NZ dollars, the country of source, bank accounts and details of any overseas tax deducted.		
<b>Offshore Investments</b>	Do you have any offshore investments, equities, pensions or super schemes? We may require further supporting information but will advise you of this.		