

SOVEREIGN PALMS ACCOUNTING LIMITED

Personal Income Questionnaire Checklist For the Income Tax Year Ended 31st March 2026

Individual's Name: _____

Please ✓ the boxes that apply to you and supply any material associated with the item.

- Salary/Wages/NZ Superannuation/Income with PAYE Deducted (I will obtain this from IRD)
- Commission (eg Sales, Real Estate Agents, Withholding Tax Income).
- Interest and Dividends: Please supply RWT Certificates, Dividend Statements
- Rental Income: Please complete the **Rental Income Checklist**.
- Other Income: Estate/Trust/Partnership/Sole Trader/Overseas Income/Super Scheme/Pensions.
- Companies/Look Through Companies: Shareholder Salary or Loss Attributed from an LTC
- Tax Credits: Donations to Charity/School Donations (NOT Activity fees.) Please supply receipts.
- Expenses: Interest paid on home mortgage/loans where funds used to purchase shares or to finance a business or for income earning purposes
Expenses Against WHT income: please complete the business questionnaire
Income Protection Insurance
- Family Assistance and Working For Families: Does Inland Revenue have all children's details, especially if there is a new birth, child over 18 during this year or shared care?

Authorisation:

- 1 I hereby instruct Sovereign Palms Accounting Limited to compile the appropriate Financial Reports and Statements under appropriate standards for the current financial year and Income Tax Returns.
- 2 I understand in particular that:
 - * Sovereign Palms Accounting Limited will limit their word to a compilation which is the collection, classification and summarisation of financial information supplied by me/us and does not include the verification of that information.
 - * Sovereign Palms Accounting Limited will append their disclaimer of liability to any compiled Financial Reports and Statements and/or Income Tax Returns
 - * Sovereign Palms Accounting Limited are not required and will not carry out an audit or a review assignment on the compiled Financial Reports and Statements and/or Income Tax Returns.
- 3 I authorise Sovereign Palms Accounting Limited to continue as my/our Tax Agent and where necessary, I authorise Sovereign Palms Accounting Limited to file with IRD, Income Tax and any other IRD Returns that are required on my behalf. I take responsibility for signing a printed copy for my file held by Sovereign Palms Accounting Limited and full responsibility for their accuracy.
- 4 Pursuant to the Privacy Act 1993, I hereby authorise Sovereign Palms Accounting Limited to communicate with Banks, Solicitors, Finance Companies and other persons or organisations to obtain information as required to complete the compilation of the Financial Reports and Statements and/or Tax Returns.

Signature: _____

Date: _____

Thank you for your efforts.

When completed, please send with attachments to:

Sovereign Palms Accounting Limited
96 Sutherland Drive
Kaiapoi 7630
Or email to spaltd18@gmail.com