2023 tax agency form for individual tax payers



Tick all the boxes that apply to you, and for each ticked box supply copies of all associated receipts, payments and tax certificates (including annual tax certificate for Portfolio Investment Entities). Please remember to sign the form too, so we can start your tax return.

Full Name:																							
Number/Street:																							
Suburb:							Postcode:																
Town/City:						:	IRD				T] _ [
1 1									Num	ber	:												
Customernumber:																							
Email address																							
Have you received Wages / WINZ Payments (no action required as IRD will send us your details direct)																							
 New Zealand interest (please provide copies of all RWT certificates for cash, and coupon payment advices for bonds) New Zealand dividends or PIE income (please provide copies of all dividend advices and annual PIE certificates) Overseas dividends or interest (please provide copies of interest and dividend advices together with a schedule of any purchases and sales of investments during the year) Share Demergers (please provide copies of details of all share demergers, reconsolidations or share splits during the year) Overseas income (please provide copies of a schedule of all overseas assets, income earned, any overseas tax paid and asset cost) Overseas pension payments (please provide copies of full details of payments received) Overseas superannuation or insurance (please provide copies of value of holdings / policy statements and payments received) Estate or Trust income (please provide copies of estate or Trust income advice) Rental income – supply copies of all receipts and invoices relating to the tenancy, including rates, insurance, repairs, maintenance, mortgage interest, and collection charges. 											cost) ved)												
Was a property purch							าดระ เ	aaree		Yes		 ettle							ase: an de	cum	 ent i	nher	 o
If yes, then please provide a copy of the sale and purchase agreement and settlement statement, and loan document where a mortgage was raised to purchase the property. If a property was purchased prior to 1 April 2018, please advise date of																							
purchase. Was a property avail:	able fo	or ren	t for tl	he fu	ıll ye	ear?										Ye	es			No			
If no, please advise the period the property was not available for rent.																							
Was a property occu]Ye	s		N	0			
If yes, please provide an	indepe	ndent	rental	valuc	ation	for the	e peri	iod.															
Are you the sharehol Through Company (L		a Qua	alifying	g Co	mpa	ny (Ç	(C) o	r Lo	ok							Y	es		N	0			
If yes, please provide det	ails of y	vour sh	narehol	'ding i	in the	e LTC o	and a	сору	of th	e IR ī	⁷ Pa	irtne.	rshi	p foi	т о	r de	tails	of ind	come	from	you	r QC.	

Other income?		Yes	No	
Supply details:				
Have you paid provisional tax relating to the tax return to be completed?		Yes	☐ No	
Would you like us to complete the donations rebate claim form? If yes, please provide copies of receipts.		Yes	☐ No	
Other				
Are you a New Zealand resident for tax purposes?		Yes	No	
Do you have any overseas shares in addition to any mentioned above?		Yes	☐ No	
If yes, please supply details:				
Have you purchased, sold or do you currently own financial instruments? For example, government or local body stock, or company notes or bonds.		Yes	☐ No	
If yes, please supply details:				
Instructions and verification Bank account for payment of refunds due direct to your account. Please inclu Account number: BANK BRANCH ACCOUNT NUMBER SUFFIX	ide a depos	sit slip.		
 I confirm that: The above details are correct and I have no other income apart from the ite applicable information. I have read and understand the fees and charges for Public Trust tax service Public Trust for determining that I do not need to file a tax return, or prepar donations rebate and attending to any other related matters. The tax agency agreement between myself and Public Trust will apply to the inconsistent with any instructions I have provided to Public Trust in this for 	es and agi ing and fil iis engage	ree to p ing my	oay any fees tax return ar	charged by nd/or
Signature(s): Dar	te:/.	/_		
Please remember: This form must be signed and returned with all other required docu	ımentation	before ı	we can start y	our tax return or

Please remember: This form must be signed and returned with all other required documentation before we can start your tax return or donations rebate. Please note that if Public Trust determines that you are not required to file a tax return you will still be charged a fee as outlined below.

Fees for tax and accounting services

Our charges are based on hourly rates that vary depending on the complexity of the work and the level of expertise required to complete it. A complete range of service charges for the products and services referred to in this checklist are available at publictrust.co.nz or any Public Trust Customer Centre.

Public Trust may change these fees in the future and reserves the right to waive or discount any fees at its discretion.