

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 Number: <input type="text"/> <input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> <input type="text"/>
Customernumber:	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
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.

Was a property purchased or sold during the year?	<input type="checkbox"/> Yes <input type="checkbox"/> No	Date of purchase: / /
<i>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.</i>		

Was a property available for rent for the full year?	<input type="checkbox"/> Yes <input type="checkbox"/> No
<i>If no, please advise the period the property was not available for rent.</i>	

Was a property occupied by a relative?	<input type="checkbox"/> Yes <input type="checkbox"/> No
<i>If yes, please provide an independent rental valuation for the period.</i>	

Are you the shareholder in a Qualifying Company (QC) or Look Through Company (LTC)?	<input type="checkbox"/> Yes <input type="checkbox"/> No
<i>If yes, please provide details of your shareholding in the LTC and a copy of the IR7 Partnership form or details of income from your QC.</i>	

