2024 tax agency form for individual tax payers

Public Trust

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:	☐☐☐ - ☐☐☐ - ☐☐☐
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.**

Was a property purchased or sold during the year?	☐ Yes ☐ No	Date of purchase: / /

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 available for rent for the full year?	☐ Yes ☐ No

If no, please advise the period the property was not available for rent.

Was a property occupied by a relative?	☐ Yes ☐ No

If yes, please provide an independent rental valuation for the period.

Are you the shareholder in a Qualifying Company (QC) or Look Through Company (LTC)?	☐ Yes ☐ No

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.

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 include a deposit slip.*

Account number:

BANK BRANCH ACCOUNT NUMBER - SUFFIX

I confirm that:

- The above details are correct and I have no other income apart from the items ticked. I have attached all the applicable information.
- I have read and understand the fees and charges for Public Trust tax services and agree to pay any fees charged by Public Trust for determining that I do not need to file a tax return, or preparing and filing my tax return and/or donations rebate and attending to any other related matters.
- The tax agency agreement between myself and Public Trust will apply to this engagement (to the extent that it is not inconsistent with any instructions I have provided to Public Trust in this form).

Signature(s): ___________________________________ Date: ____/____/____

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.