



Client: _____

Contact Phone No: _____

Email Address: _____

PERSONAL INCOME CHECKLIST

- Overseas Income** - Details/advice notices of income received from any overseas sources
(Interest/Dividends/Pensions) or your Investment Advisor's report
- Rental Income** - Details of rental income and expenses as per attached questionnaire
- Donation Rebates** - If you require assistance to complete the rebate claim form please
forward all receipts
- Income Protection Insurance** - Details of premiums paid during the year
- Other Income** - Details of income earned from any other entity for which we do not act,
(partnership, Look Through Company, company shareholder salary)
- Holiday Home** - If you have a property that is used privately and also rented out,
please complete the separate questionnaire
- Crypto assets e.g. bitcoin** – If you received or traded in crypto assets, please provide:
- The type of crypto asset;
 - For each transaction provide the date, type of transaction i.e. received or disposed of, number of units, value in NZD
 - Total units of each crypto asset held at the beginning and end of the year
 - Exchange records and bank statements
 - Wallet addresses

I authorise you to prepare financial statements from the information and records I have supplied to you. I advise you not to complete an audit or review. I accept responsibility for the accuracy and completeness of all records and information supplied to you.

Information and Signing Authorisation:

I authorise Helston & Associates Ltd to obtain any information and sign any Returns on my behalf, regarding my tax affairs.

Name:..... Signed:.....

Date:.....