



Client: _____

Contact Phone No: _____

Email Address: _____

PERSONAL INCOME CHECKLIST 2026

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 attached 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: _____