

Annual Checklist (1 April 20__ to 31 March 20__) Page 2

Please complete this list carefully, then RETURN it to us along with the documents/information:	Client <input type="checkbox"/> if supplied	Client <input type="checkbox"/> if to send later
<p>19) If self-managing your property; have you supplied us with the SQUARE METRE size of your HOME OFFICE? For help click on http://www.cavbrem.co.nz/tools/floor-calculator.aspx</p> <p>20) If self-managing your property; for the HOME in which YOU LIVE please also supply invoices showing total interest paid on mortgage(s), council rates, home insurance, electricity/gas, repairs/maintenance, total rent paid (if you don't own the home).</p> <p>21) If you have your OWN BUSINESS (self-employed or a non-rental property business) please nominate which entity will claim home office expenses supplied at 18.</p>	<p>.....</p> <p>.....</p> <p>.....</p>	<p>.....</p> <p>.....</p> <p>.....</p>
<p>22) Did you PURCHASE any new/second-hand ASSETS (value \$500 or more)? Supply invoice or purchase date, amount, description.</p> <p>23) Did you buy a CAR (or any other asset) in the NAME of the LTC?</p> <p>24) Did you SELL, TRADE-IN or WRITE-OFF any ASSET? Supply invoice/receipt with date, amount, description. (Check <u>Asset Schedule</u> in Xero or <u>Depreciation Schedule</u> in annual report for item)</p>	<p>.....</p> <p>.....</p> <p>.....</p>	<p>.....</p> <p>.....</p> <p>.....</p>
<p>25) PERSONAL INCOME – Have you supplied details of BANK CONTRIBUTIONS, OVERSEAS INCOME, DONATION receipts, CASH JOBS, DIVIDENDS & INTEREST received?</p> <p>26) Have you supplied us with any income protection policy(s) and invoice(s)?</p>	<p>.....</p> <p>.....</p>	<p>.....</p> <p>.....</p>
<p>Important Questions:</p> <p>27) Did you PURCHASE PROPERTY or LAND <u>during 1/4/</u> <u>-31/3/</u> ? Have you advised us?</p> <p>28) Did you CHANGE BANK or LENDING INSTITUTION <u>during 1/4/</u> <u>-31/3/</u> ? If an ACCOUNT was CLOSED, to obtain statements, you must contact the bank/lending institution within 6 months or charges may apply.</p> <p>29) Did you SELL PROPERTY or LAND <u>during 1/4/</u> <u>-31/3/</u> ? Have you advised us?</p> <p>30) Did you BEGIN, FINISH or ABANDON CONSTRUCTION OF A PROPERTY <u>during 1/4/</u> <u>-31/3/</u> ? Have you advised us of details/dates?</p> <p>31) If you PURCHASED PROPERTY or FINISHED CONSTRUCTION at any time since 1/4/1 have you obtained a CHATELS-SPECIFIC VALUATION from Valult? For reasons click on http://www.epsomtax.com/blog/valuation-of-chattels-why-necessary</p> <p>32) If PLANNING to PURCHASE, SELL or RENOVATE a property have you advised us?</p> <p>33) Have you obtained AUDIT insurance? For reasons click on http://www.epsomtax.com/blog/what-is-audit-shield-accountancy-insurance</p>	<p>.....</p> <p>.....</p> <p>.....</p> <p>.....</p> <p>.....</p> <p>.....</p> <p>.....</p> <p>.....</p> <p>.....</p> <p>.....</p>	<p>.....</p> <p>.....</p> <p>.....</p> <p>.....</p> <p>.....</p> <p>.....</p> <p>.....</p> <p>.....</p> <p>.....</p>
<p>34) Have you sent us the annual EpsomTax.com questionnaire for FY17? To do so click on http://www.epsomtax.com/taxqcurrent.html</p>	<p>.....</p>	<p>.....</p>
<p>35) If this is your first return with EpsomTax.com have you sent us authorisation(s) to act on behalf of each person and entity that has an IRD number?</p> <p>Please note this is a legal requirement enforced by the IRD and we can't file your return without this authorisation. To do so click on http://www.epsomtax.com/auth.html</p>	<p>.....</p>	<p>.....</p>