

## 20.... TAX RETURN INFORMATION MEMORANDUM

(name).....

Please check the following details and amend if not correct or fill in if missing:

Phone \_\_\_\_\_ Fax \_\_\_\_\_  
 Cell phone \_\_\_\_\_ Email Address: \_\_\_\_\_  
 Date of Birth \_\_\_\_\_ ACC Number \_\_\_\_\_

Bank account number you want any tax refund direct credited to (an IRD requirement).  

                          
  

*Bank                          Branch                          Account Number                          Suffix*
  
 Account Name: \_\_\_\_\_

The following information is provided for Mead Stark Ltd to compile my 20.... tax return.

<b>For Individuals Tax Returns</b>		
<input checked="" type="checkbox"/>	Item needed	Further Details
	Interest Certificates	All annual interest summaries (banks and investment organisations you have an investment with will send a summary for the tax year to you)
	Portfolio Reports	If you have funds handled by Fund Managers, we require a copy of the portfolio report
	Dividend Statements	All dividend statements from Companies you have shares in
	Income Details of:	Commissions, Partnerships, Estates, Trusts, Sundry income etc
	Rental Details	Income and expenses related to any property from which you received rents.
	Working for Families (Formerly Family Assistance)	Names and ages of any dependent children as support is available to people bringing up children. This entitlement depends on the number of children you have and the amount of your family income.
	Overseas Income	Any Income received from an overseas source (interest, dividends, royalties, commissions, rentals, partnership, company or trust income etc)
	Possible Additional Information	We may need at some later date all or some of your suppliers' statements and invoices. We will let you know if we require these.
There are probably items above that do not affect you. If you are uncertain about any point, please do not hesitate to contact us.		

Sign \_\_\_\_\_ Date \_\_\_\_\_

29 THE MALL, P O BOX 31, CROMWELL  
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 EMAIL: cromwelldesk@meadstark.co.nz

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 EMAIL: wanakadesk@meadstark.co.nz