

**Client Name:** \_\_\_\_\_

*If any of the following has changed since last year, please provide:*

**Contact Information:**

Address: \_\_\_\_\_

Phone: \_\_\_\_\_

Email: \_\_\_\_\_

**Bank Account details for IRD refunds:**

Account Name: \_\_\_\_\_

Account Number: \_\_\_\_\_

**Information Required (if applicable) for period 01/04/2025 – 31/03/2026**

	<b>Enclosed</b>	<b>N/A</b>
• Dividends Received (attach dividend statements)	<input type="checkbox"/>	<input type="checkbox"/>
• Interest Received (attach RWT Certificates)	<input type="checkbox"/>	<input type="checkbox"/>
• Income Protection Insurance Premiums paid (please include statements)	<input type="checkbox"/>	<input type="checkbox"/>
• Receipts for Donations Paid	<input type="checkbox"/>	<input type="checkbox"/>
• Superannuation (if overseas)	<input type="checkbox"/>	<input type="checkbox"/>
• Any other income you received that was not lodged with IRD	<input type="checkbox"/>	<input type="checkbox"/>
• Working for Families (if applicable please fill in page 2. If this section is not completed, we are unable to calculate your Working for Families)	<input type="checkbox"/>	<input type="checkbox"/>
• Provide details of any Crypto or Digital Assets you may own	<input type="checkbox"/>	<input type="checkbox"/>
• Provide details of any offshore bank accounts, borrowings, property, investment income or interests in overseas trusts, overseas superannuation and insurance policies	<input type="checkbox"/>	<input type="checkbox"/>

**Working for Families**

**Yes**

**No**

**Spouse's Name:** \_\_\_\_\_ **Spouse's IRD Number:** \_\_\_\_\_

<b>Child's Name</b>	<b>DOB</b>	<b>IRD Number</b>	<b>Shared Custody Y / N and if so, how many days?</b>
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

**Other Payments**

**Y / N**

**Total \$**

Please provide details of any other income received that is used to calculate working for families. This includes other payments in excess of \$5,000 per annum used for the family's living expenses.

\_\_\_\_\_

**I confirm that the information provided is true and correct and I authorise Evans & Co Accountants Ltd to use this information in the preparation of my/our Financial Accounts and Tax returns.**

**Signed:** \_\_\_\_\_

**Name:** \_\_\_\_\_

**Date:** \_\_\_\_\_