



Client: _____

Contact Phone No: _____

Email Address: _____

March 2021

PERSONAL INCOME CHECKLIST 2021

Interest Certificates

Dividend Statements

Overseas Income - Details/advice notices of income received from any overseas sources (e.g. Interest/Dividends/Pensions, etc.) 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, e.g. partnership, Look Through Company.

Holiday Home - If you have a property that is used privately and also rented out, please complete the attached questionnaire.

I ask that you sign the information authority below and return this questionnaire with your information to my office as it is getting increasingly difficult with the Privacy Act to obtain information from any source without authorisation.

Phillip J Blacktopp
ACCOUNTANT

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 _____