

Tax Return Checklist - 31 March 2021

Name	Email Address		
Address			
Phone Number	IRD Number	Are you GST registered?	
		Yes	No
Are you a:	Rideshare Driver	Delivery Driver	

Please answer all of the following questions (for the financial year 01 April 2020 to 31 March 2021). Complete a separate form for prior years if required.

1. Please provide details of your earnings for the 12 months from 01 April 2020 to 31 March 2021

- A) **Uber** *(you can also send tax summary)*
- B) **Ola**
- C) **Didi**
- D) **Zoomy**
- E) **Other driving income**
- F) **Any other non-taxed income**
- G) **Wage subsidy**
- H) **Resurgence Support payments**

Note: We can access your wage/salary details through IRD and will include in your tax return.

2. If this was your first year driving please advise which month you started.
(Note: Mileage and expense details apply from when you started driving if you didn't drive for the whole tax year)

3. Mileage: How many km's did your business vehicle/s travel between 01 April 2020 and 31 March 2021? *(Total including business and personal use)*

4. What was the rideshare/business use percentage of your vehicle use?

5. Vehicle Details

Car 1	Year, make and model	Fuel type (<i>Petrol, Diesel, Hybrid, Electric etc</i>)	Was it financed?
	Purchase Date (D/M/YYYY)	Cost (\$)	Yes No
Car 2	Year, make and model	Fuel type (<i>Petrol, Diesel, Hybrid, Electric etc</i>)	Was it financed?
	Purchase Date (D/M/YYYY)	Cost (\$)	Yes No

- Did you sell or dispose any business vehicle or other asset between 01 April 2020 and 31 March 2021? If yes, provide date and funds received.

Date (D/M/YYYY) Funds Received (\$)

Details

6. Did any of the following apply to you?

Interest or dividends received	Yes	No	Did you purchase or sell investment property?	Yes	No
Income from rents?	Yes	No	Any income from 'working for families'	Yes	No
Income or losses from a company/ partnership/ trust/estate	Yes	No	Any other benefits or superannuation	Yes	No

Email us interest or dividend certificates if applicable

7. Garage/Home office expenses

Total area of house (sqm) Area of internal garage where your rideshare/delivery vehicle is kept (if applicable)

Area of office/workspace Weekly rent (\$) Annual mortgage interest (\$) Power and gas (\$)

Home and contents insurance (\$) Council rates/water bill total (\$) Landline rental and Internet (\$)

8. Expense details

- Providing full expense details will result in a lower tax bill! Applies to 1 April 2020 - 31 March 2021.
- We do not need to see actual receipts (expenses must be legitimate business expenses in case of IRD checks).
- If you have an accounting system such as TaxSnaps or Xero please share with us, otherwise provide totals from your records.
- We can't go through personal bank statements sorry as it is sometimes impossible to work out what is rideshare expenditure and what is personal.

Vehicle registration/COF (\$)

Vehicle insurance (\$)

Vehicle finance costs - just email loan contract (\$)

Fuel (\$)

Repairs and maintenance/tyres (\$)

Lease payments (if rented car) (\$)

Mobile phone handset and data (\$)

Cleaning costs (\$)

Licensing (P endorsement, medical certificate, SPSL, logbook, background check etc) (\$)

TAMS fees (\$)

Income protection insurance (\$)

ACC premiums (\$)

Last year's accounting fees (\$)

Miscellaneous costs (cables, water, mints, parking, stationary, aux cord, dash cam, NZTA camera, tints, police radar, vacuum, stereo upgrade, phone mount, reverse camera, IT equipment, subscriptions (Spotify etc). *Speeding/bus lane fines etc are not tax deductible*

Tax Tips

- Drivers should have a system to file expense records (physically or online). I use www.taxsnaps.co.nz which records photos & details of each receipt.
- It is also advisable to have a separate business bank account.
- You may find it useful to put aside money for tax throughout the year (20% of what you receive before expenses will normally cover it)
- GST: You must register for GST if your turnover is over \$60,000 in a 12 month period (not including salary & wages).
- If you made charitable donations, don't forget to claim your rebate.
- As your tax agent, Rideshare Consultants will have authority to act on your behalf for all tax types except child support.

Full Name

Signature

Tax Return Fees

- Please pay tax return fee to the bank account below.
- We require \$100 in advance with the balance invoiced when ready for IRD submission.
- Cancellations after receipt of checklist will incur a \$50 admin fee

Bank account details Rideshare Consultants Ltd

Part Time Drivers

Full Time Drivers

03-1506-0142385-00

\$170.00+GST

\$220.00+GST

Extra charges apply for GST returns & company accounts etc.

Thank you for using our tax return service!