**Individual Tax Return Questionnaire**

For the year ended 30 June Click here to enter year.

|  |  |  |  |
| --- | --- | --- | --- |
| Name: |        | Date Of Birth |       |
| Tax File Number (TFN): |        | Has your postal/residential changed since your last tax return? If yes please update your details. |       |

|  |  |  |  |
| --- | --- | --- | --- |
|  | **Please mark “y” “n” or “n/a” where relevant:** | **Y, N, N/A** | **Details/Notes** |
| 1. **Were you employed during the financial year? Please provide your PAYG payment summary statements for each employer.**
 |  |       |
| 1. **Did you receive Reportable Fringe Benefits?**
 |  |       |
| 1. **Did you receive a Lump Sum or Eligible Termination Payments due to roll-over, termination, compensation or legacy? Please provide your PAYG payment summary statements.**
 |  |       |
| 1. **Did you receive Australian government allowances & payments such as Newstart, youth allowance, Austudy, parenting payment single or partnered, or pension/annuities? Please provide your PAYG payment summary statements.**
 |  |       |
| 1. **Did you withdraw from your superannuation during the financial year? Please provide your PAYG payment summary statements**
 |  |       |
| 1. **Did you receive Attributed Personal Services Income? You would have received *PAYG Payment Summary - business and personal services income* showing an X against “Personal service attributed income”. Please include this document with your work papers.**
 |  |       |
| 1. **Did you receive any interest? Please provide details below or attach your own summary.**
 |  |       |
|  |  |  |
| **Bank**  | Account No. | Amount 100% | Tax Withholding | Client % |
|  |       |       |       |       |
|  |       |       |       |       |
|  |       |       |       |       |
|  |       |       |       |       |
|  |       |       |       |       |

|  |  |  |
| --- | --- | --- |
| 1. **Did you receive Dividends? Please provide details below or attach your own summary.**
 |  |       |
| **Company** | Date Paid | Unfranked | Franked | Franking Credits  | TFN withholding | Client % |
|  |       |       |       |       |       |       |
|  |       |       |       |       |       |       |
|  |       |       |       |       |       |       |
|  |       |       |       |       |       |       |
|  |       |       |       |       |       |       |
| 1. **Did you receive a Partnership or Trust distribution? (Unit, Cash Management, Deceased Estate).Please provide your annual statements.**
 |  |       |
| 1. **Do you maintain your own Business? If YES, please select one of the following options:**

**[ ]  “Business Schedules.xls”****[ ]  Own income and expenses summary****[ ]  Supply original documents (please go to “Business Checklist” for generally requested documents. You can contact us for a tailored list for your circumstances**  |  |       |
| 1. **Did this business (inc Partnership) have a deferred loss last year?**
 |  |       |
| 1. **Do you have any Net farm management deposits or withdrawals?**
 |  |       |
| 1. **Did you dispose of any assets during the year? (e.g. Shares, land)**

**If YES, provide your Purchase and Sale contracts.** |  |       |
| 1. **Did the CGT event relate to a forestry investment scheme?**
 |  |       |
| 1. **Do you have Foreign Source income, asset or property – include foreign employment income and pension? Please provide your annual statement.**
 |  |       |
| 1. **Do you have a Rental property? If YES, please select one of the following options:**

**[ ]  “Rental Property Schedules.xls”****[ ]  Own income and expenses summary****[ ]  Supply original documents (please go to “Rental Property Checklist” for generally requested documents. You can contact us for a tailored list for your circumstances.** |  |       |
| 1. **Do you have any income producing hobbies? For example: Selling unique handmade items on the internet or your local market.**

**Please see our resources for assistance with this topic “Is it a business or a hobby?”** |  |       |
| 1. **Do you have any Other Income – for example: Jury Service, Employee Share Plan, Sickness & Accident policy payments foreign exchange gain, scholarship awards.**

**Please provide details below:** |  |       |

OTHER INCOME

|  |
| --- |
| Click here to enter text. |

**EXPENSES**

**Please mark “y” “n” or “n/a” where relevant:**

|  |  |
| --- | --- |
| 1. Did you use your private motor vehicle for Work related purposes (NOT 1 tonne Utes)

Is the motor vehicle registered in your name? If not, do you have a private arrangement that deems you the owner of the vehicle?  |  |
| CAR Make Model: Engine Size: Choose an item.No. of Klms: Klms/week X       weeks X       c/klm Klms/week X       weeks X       c/klm**Purpose of travel:**  |
| Logbook Method – Business%...     ........**Purpose of travel:**

|  |  |  |
| --- | --- | --- |
| Car Make Model & Engine Size | 1.       | 2.       |
| Cost/date of purchase/contract |  |  |
| Odom Beg |  |  |
| Odom End |  |  |
| Depreciation 19/5/06 25% DM |  |  |
| Fuel |  |  |
| Insurance |  |  |
| Interest Paid (HP/Loan) |  |  |
| Leases |  |  |
| Registration |  |  |
| Repairs/Services/Cleaning |  |  |
| Tyres |  |  |
| Other |  |  |

 |  |
| 1. Did you incur any expenses for travel relating to work, including accommodation, meals, incidentals etc.? Including vehicle expenses for over 1 tonne vehicles. Please provide details or your own summary.
 |  |       |
| 1. Are you required to wear Protective/Occupational specific/Non Compulsory/Compulsory work Clothing?
 |  |       |
| * 1. Did you purchase work related clothing?
 |  |       |
| * 1. Are you required to wear safety shoes/headgear/high visibility?
 |  |       |
| * 1. Are you required to wear sun protection products?
 |  |       |
| * 1. Do you wash you work clothes?

Please estimate the following: Laundry       loads/week X $ per load X       weeks$1 washed separately 50 cents if washed with other items |  |       |
| * 1. Do you have any Dry Cleaning / Repair expenses?
 |  |       |
| 1. Do you have any Self Education Expenses – Related to current employment
 |  |       |
| Name of Course:       |  |
| Institution:       |
| Books/Stationary | Fees/union fees | Other/Repairs | Travel klm | Capital items/depreciation |  |
|       |       |       |       |       |
|       |       |       |       |       |
|       |       |       |       |       |
|  |  |  |  |  |
| 1. Do you have any other work related expenses?

**Please note** $300 concession excludes claims for overtime meal allowance expenses, travel allowance expenses, award transport expenses and car expenses.**Please provide details below:** |  |       |
| * 1. Tools and Equipment (e.g. Computer, printer, software)?
 |  |       |
| * 1. Home office?       Hrs/Week X       Weeks X 26c/hr
 |  |       |
| * 1. Union Fees?
 |  |       |
| * 1. Overtime meal (only claimable if Group Cert has meal allowance)?

Amount must be the amount incurred. $22.60 is maximum without receipts. |  |       |
| * 1. Telephone / Mobile? (Please confirm private %)
 |  |       |
| * 1. Stationery / Journals / Publications / Briefcases / Subscriptions
 |  |       |
| * 1. Seminars / Accommodation / Travel
 |  |       |
| * 1. Sun protection – sunscreen & sunglasses etc (receipts)
 |  |       |
| * 1. **Other Expenses?** Please provide details in the table below “OTHER EXPENSES” at the end of this document or provide your own summary or receipts.
 |  |       |
| 1. Do you have Interest and Dividend Deductions? Please note you cannot claim a deduction if you haven’t received any dividends or interest during the financial year.

Note: Share Software to be depreciated at effective life of 2.5 years. |  |       |
| 1. Do you make any Gifts or Donations more than $2? Building Funds NOT Building Levies. Fund Raising Events.
 |  |       |
| 1. Cost of managing tax affairs? Including travel to accountants office (request how many kilometers and engine size) (Not part of 5000kms)
 |  |       |
| 1. Did you have capital expenditure directly connected with a project?

You may be able to claim a deduction at this item for capital expenditure allocated to a project pool for a project you:* 1. undertook or participated in during the financial year for a taxable purpose
	2. carried on, or proposed to carry on, for a taxable purpose which was abandoned, sold or otherwise disposed of in 2012-13, before or after it started to operate.
 |  |       |
| 1. Did you receive a foreign pension or annuity of Undeducted Purchase Price (UPP)?

Please note to claim the deduction you must have income from a foreign pension or annuity. |  |       |
| 1. Did you make a personal superannuation contribution to a complying superannuation fund or Retirement Savings Account (RSA)? Non-employer sponsored superannuation contributions.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Institution | Fund ABN | Policy No. | Amount Contributed | Deduction |
|       |       |       |       |       |

**Please note:** You MUST have a letter showing amount contributed and your intention whether claiming Government Co-contribution or a tax deduction for the financial year. |  |       |
| 1. Do you have any other deductions - e.g.: Income Protection & Sickness Insurance, PSI Losses and post cessation business expense
 |  |       |
| 1. Did you make a payment to a Forestry Investment Scheme (FMIS)?
 |  |       |
| 1. Do you have Private Health Insurance? Please provide your annual statement with your work papers.
 |  |       |

OTHER EXPENSES

|  |  |  |
| --- | --- | --- |
| Item Number | Details | Amount $ |
|       |       |       |
|       |       |       |
|       |       |       |
|       |       |       |
|       |       |       |
|       |       |       |
|       |       |       |
|       |       |       |
|       |       |       |
|       |       |       |
|       |       |       |
|       |       |       |
|       |       |       |
|       |       |       |
|       |       |       |
|       |       |       |
|       |       |       |
|       |       |       |
|       |       |       |