**Individual Tax Return Questionnaire**

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

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

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|  | **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.** | | | | |  |  |
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| **Bank** | | Account No. | Amount 100% | Tax Withholding | Client % | |
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| 1. **Did you receive Dividends? Please provide details below or attach your own summary.** | | | | | |  |  |
| **Company** | Date Paid | Unfranked | Franked | Franking Credits | TFN withholding | Client % | |
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| 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

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| Click here to enter text. |

**EXPENSES**

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

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| 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 |  | |
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| 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

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| Item Number | Details | Amount $ |
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