

Personal Tax Return Instructions

Your Last Name		
Your Given Names		
Postal Address		
Residential Address (if different to postal address)		
Your Occupation		
Work Phone No		
Mobile Phone No		
Home Phone No		
Fax No		
Email Address		
Contact Me During Normal Office Hours	At Home / At Work / On Mobile / By Email	
Bank Account Details (NOTE: If you are expecting a refund, the ATO no longer issue refund cheques. Payment will be by EFT.)	BSB:	Acct No:
	Account Name:	
Send a copy of my completed return by	Email / Post / I Will Collect	

MAKE YOUR NUMBERS COUNT

Your Family

Spouse Surname, if different (incl same sex couples)				
Spouse Given Names				
Did You Have a Spouse for the Full Year?		Yes / No		
If no, period you had a spouse		From ____/____/____ To ____/____/____		
Spouse Date of Birth		____/____/____		
Spouse Income (but we prefer a copy of the return)		Dependent Childrens' Details (if applicable)		
Taxable Income	\$	Name	Date of Birth	Taxable Income
Govt Pensions (Item 6 on return)	\$			
Exempt Pension Income	\$			
Reportable Fringe Benefits *	\$			
Reportable Super Contributions	\$			
Net Investment Loss	\$			
Child Support (paid by spouse)	\$			

* Employer is exempt from FBT Yes / No

Income

1. Did you receive Payment Summaries?

Yes ☐ No ☐

If no, go to question 2.

If yes, we need copies of all payment summaries for wages, lump sum payments (both employer & superannuation), Australian Government pensions & allowances, annuities and superannuation income streams. For income streams, we also need any letter(s) and schedule(s) sent to you by the provider with your payment summary.

2. Did you receive or reinvest any Interest?

Yes ☐ No ☐

If no, go to question 3.

If yes, record details below showing **total interest received** on each account or provide statements etc.

Name of Institution	Account No	Total Interest	Tax Withheld	No of Holders
		\$	\$	
		\$	\$	
		\$	\$	
		\$	\$	
		\$	\$	

3. Did you receive or reinvest any Dividends from Shares owned?

Yes ☐ No ☐

If no, go to question 4.

If yes, read on and fill in the details below with **total dividends** received or send all dividend statements.

NB 1 Dividends reinvested must be declared as income, even though you didn't receive any money.

NB 2 Dividends are assessable in the year of payment. Look for the date of payment on the dividend statements.

Company	Unfranked	Franked	Imp Credit	Tax Withheld	No of Holders
	\$	\$	\$	\$	
	\$	\$	\$	\$	
	\$	\$	\$	\$	

4. Did you receive Distributions from Managed Funds?

Yes ☐ No ☐

Managed funds are investments in unit trusts such as BT, Colonial, MLC etc

If no, go to question 5.

If yes, we need annual Tax Statements from each fund. NB some funds are slow in sending tax statements to investors.

5. Did you Sell any Assets?

Yes ☐ No ☐

If you sold assets such as shares, units in trusts or property which were acquired after 20 September 1985, you may have to pay capital gains tax (cgt). Your main residence is exempt from cgt providing it was never used to produce income.

If no, go to question 6.

If yes, we need documents which show dates and amounts for purchase, sale and incidental costs. For managed funds, we need the Tax Statement from the fund manager or documents showing cost and sale amounts for all units sold.

6. Did you receive Rental Income?

Yes ☐ No ☐

If no, go to question 7.

If yes, we need a summary of income and expenses for each rented property or the agent's annual or monthly statements and a summary of expenses paid by you direct.

Also, send loan statements or advise amount of interest paid on any loan to buy each property.

Also, send page one of the contract, your solicitor's letter including settlement sheets and a quantity surveyor's report for depreciation if the property was purchased during the year.

7. Did you receive any Other Income not referred to above?

Yes ☐ No ☐

If no, go to question 1 under Deductions.

If yes, attach details. Other income could include **foreign income or pensions**, distributions from **partnerships** and/or **trusts**, income from your own **business**, bonuses from **life insurance companies** or **friendly societies**, income from **forestry managed investment schemes**, amounts for **lost salary or wages** paid under an income protection or sickness and accident policy or workers compensation scheme and discounts on shares or rights acquired under an **employee share scheme**. For the latter, we will need your **employee share scheme statement** which should have been given to you by your employer. If you have **business income**, you will also need to provide us with either your cashbook or computer data or a summary of income and expenses, including GST calculations if you are a GST-registered business.

Deductions

VIP If your total work-related expenses exceed \$300 (excl car expenses and claims against certain allowances) you must have receipts to prove the total amount, not just the amount over \$300.

1. Did you use your Car for work <u>AND</u> keep a Log Book?			Yes	
<p>If no, go to question 2. If yes, you are entitled to claim the cost of using your car for work based on a log book kept for a continuous period of 12 weeks within the last five years.</p> <p>Insert details of your car and expenses incurred here and go to question 3.</p>	Make: Holden		Model: Captiva	
	Date Purchased		Business Use This Year	%
	Cost	\$	Year Log Book Kept	
	Petrol & Oil	\$	Interest Paid	\$
	Registration	\$	Send loan or lease agreement if this is the first year of your claim or you are a new client	
	Comp Insurance	\$	Services	\$
	3rd Party Insurance	\$	Tyres & Batteries	\$
	Fee for Rego Check	\$		\$
	Repairs	\$		\$
Lease Payments	\$		\$	
2. Did you use your Car for work and <u>NOT</u> keep a log book?			Yes <input type="checkbox"/> No <input type="checkbox"/>	
<p>If no, go to question 4. If yes, insert the details of your car(s) here and go to question 3.</p> <p>VIP You must exclude trips between home and your normal place of work (some exceptions do apply to this rule – contact our office for more details)</p>	Make			
	Model			
	Business Kms (max 5,000 per car)			
<p>You are entitled to claim the cost of using your car(s) for work based on a <u>reasonable estimate</u> of the kilometres travelled up to a maximum of 5,000 kms <u>per car</u>. The deduction is 66 cents per business kilometre regardless of the engine capacity of your car.</p>				
3. Tell Us How You Used Your Car for Work Here:				
4. Did you incur Work-related Travel Expenses?			Yes <input type="checkbox"/> No <input type="checkbox"/>	
<p>If no, go to question 5 If yes, record details here.</p> <p>Note: If your payment summary includes a travel allowance and it is “reasonable” (i.e. it is within ATO guidelines), you may be able to claim an amount per day for accommodation, meals and incidentals without receipts. Contact us for more information.</p>	Taxis	\$	Accommodation	\$
	Buses	\$	Meals	\$
	Trains	\$	Citylink	\$
	Parking	\$		\$
	Car Hire	\$		\$
	Airfares	\$		\$

5. Did you incur Work-related Clothing Expenses?			Yes <input type="checkbox"/>	No <input type="checkbox"/>
<p>If no, go to question 6. If yes, record details here.</p> <p>Please note that you cannot generally claim a deduction for conventional clothing.</p>	Compulsory Uniform	\$	Dry Clean Uniforms	\$
	Non-Compulsory Uniform	\$	Home Laundry	washes/wk
	Occupation Specific	\$	Home laundry of uniforms or protective clothing only. Not conventional nor everyday clothing	
	Protective Clothing	\$	Sun Hats	\$
	Work Boots	\$		\$
6. Did you incur Self Education Expenses?			Yes <input type="checkbox"/>	No <input type="checkbox"/>
<p>If no, go to question 8. If yes, you can claim a deduction if the content of the course was relevant to the work you were doing as an employee at the time you were studying.</p> <p>Deductions cannot be claimed simply because you received Youth Allowance, Austudy or Abstudy. Nor can you claim self-education expenses that will help you to get a new job.</p> <p>If you satisfy these conditions, complete these details and go to question 7.</p>	Course Description			
	Name of School, College or University			
	Date Commenced			
	Date Finished			
	Fees (not HELP)	\$	Home Office Hours	Hrs/Week
	Text Books	\$	Home Office Weeks	Weeks
	Stationery	\$	Other	
	Photocopying	\$	Kilometres Travelled*	
	Student Union	\$	Description of Car	
	<p>* You can claim the kilometres travelled directly between home or work and your place of education and return. If you travelled from home to your place of education and on to work or from work to your place of education and home, only claim the first leg of each trip.</p>			
7. Tell Us How Your Course is Work-Related Here:				

8. Did you incur any other Work-Related expenses?				Yes <input type="checkbox"/>	No <input type="checkbox"/>
If no , go to question 9 If yes , enter total expenses (before private use if any) on the right and indicate below the proportion of work use of those items also used for private purposes. Also, enter below that, equipment costing more than \$300 per item.		Computer Software (total)	\$	Safety Equipment	\$
		Computer Supplies (total)	\$	Stationery	\$
		Conferences/Seminars	\$	Subscriptions	\$
		Home Office	hours/week	Sun Screen/Glasses	\$
		Internet Access (total)	\$	Telephone - home	calls/wk
		Meal allowance rec'd	\$ /meal	Telephone – mobile (tot)	\$
		Meal allowance spent	\$ /meal	Tools (<\$300/item)	\$
Work & Private Use Items		Office Equip (<\$300/item)	\$	Union Fees	\$
<i>Item</i>	<i>Work %</i>	Postage	\$		\$
Computer	%	Professional Fees	\$		\$
Internet Access	%	Reference Books/Journals	\$		\$
Mobile Phone	%	Repairs	\$		\$
Work-Related Equipment Purchased Costing More than \$300					\$
<i>Description</i>	<i>Cost</i>	<i>Date of Purchase</i>	<i>Bus Use</i>		\$
	\$	____/____/____	%		\$
	\$	____/____/____	%		\$
	\$	____/____/____	%		\$
9. Did you pay Interest on Investment Loans (excl rental properties)?				Yes <input type="checkbox"/>	No <input type="checkbox"/>
If no , go to question 10 If yes , complete these details.		Lender's Name and Description of Investment		Interest Paid	
				\$	
				\$	
				\$	
10. Did you donate to Charities or School Building Funds?				Yes <input type="checkbox"/>	No <input type="checkbox"/>
If no , go to question 11 If yes , complete these details or attach a list. Receipts will confirm that the donation is deductible.				\$	
				\$	
				\$	
11. Do you have any Other Deductions not referred to above?				Yes <input type="checkbox"/>	No <input type="checkbox"/>
If no , go to Q1 at Tax Offsets. If yes , complete these details. VIP: If you are claiming a deduction for personal super contributions , you must notify the fund, and receive a written acknowledgement, of your intention to claim the deduction. Please provide us with a copy of this acknowledgement.		Income Protection Insurance		\$	
		Tax Return Fee Last Year (if not prepared by us)		\$	
		Personal (deductible) Superannuation Contributions		\$	
				\$	
				\$	
				\$	

Tax Offsets

1. Do you have Private Health Insurance?		Yes <input type="checkbox"/> No <input type="checkbox"/>	
<p>If no, go to question 3. If yes, we need your private health insurance statement, and go to question 2.</p>			
2. If you have Private Health Insurance, were all of your Dependents (including your Spouse if applicable) covered for the whole of the year?		Yes <input type="checkbox"/> No <input type="checkbox"/> N/A <input type="checkbox"/>	
<p>Medicare levy surcharge may be payable if you or your dependants (incl your spouse) do not have an appropriate level of private patient hospital cover for the whole year. An appropriate policy has an excess of \$500 or less (1 person) or \$1,000 or less (all others).</p>			
3. Did you make Superannuation Contributions for your Spouse?		Yes <input type="checkbox"/> No <input type="checkbox"/>	
<p>If no, go to question 4. If yes, and your spouse's income is less than \$40,000, insert details here.</p>		Amount Contributed \$	
4. Did you live in a Remote Area of Australia or Serve Overseas?		Yes <input type="checkbox"/> No <input type="checkbox"/>	
<p>If no, go to question 5. If yes, insert details here</p>	Location	Period From	Period To
5. Did you spend \$2,333 or more on Disability Aids or Attendant or Aged Care?		Yes <input type="checkbox"/> No <input type="checkbox"/>	
<p>If no, go to question 1 at Other. If yes, read below & show total out-of-pocket expenses here.</p> <p>Commencing with the 2016 return, this offset can now only be claimed by taxpayers with net expenses for disability aids and attendant care or aged care. Net (out-of-pocket) expenses are your total eligible medical expenses minus refunds from Medicare, National Disability Insurance Scheme (NDIS) and private health insurers which you or someone else, received or are entitled to receive.</p>		<p><u>Out-of-Pocket Medical Expenses</u></p> <p>\$</p> <p>Note income tests apply and your expense threshold may be \$5,504. We will advise which threshold applies when we prepare your return.</p>	

Other

1. Do you have a Government Loan (HELP, SSL, TSL or SFSS)?		Yes <input type="checkbox"/> No <input type="checkbox"/>
If no, go to question 2. If yes, insert amount(s) owing here.		HELP bal at 30 June \$ SSL bal at 30 June \$ TSL bal at 30 June \$ SFSS bal at 30 June \$
2. Have you paid Pay as You Go Income Tax Instalments this year?		Yes <input type="checkbox"/> No <input type="checkbox"/>
If no, go to question 3. If yes, show the total paid here.		<u>Total Paid</u> \$
3. Other amounts required for Income Test purposes		Yes <input type="checkbox"/> No <input type="checkbox"/>
Tax free government pensions received by you	\$	
Child support payments made by you	\$	
4. Are you a New Client to our Practice?		Yes <input type="checkbox"/> No <input type="checkbox"/>
If no, go to question 5. If yes, please send us a copy of your return for the previous financial year.		
5. Please show here any other information or ask us any question about your return		
Please sign and date below. <div style="display: flex; justify-content: space-between;"> <div style="width: 30%;"> _____ Signature </div> <div style="width: 30%;"> ____/____/____ Date </div> <div style="width: 30%;"></div> </div>		