



Individual Tax Return Questionnaire

Please note, the more thorough and organized your information is, the quicker we can do your work and the less it will cost!

Name: _____

Year: _____

Admin

1	<p>Preferred method to send my tax return for signing:</p> <p>€ Email - Email Address _____</p> <p>€ Post</p> <p>€ Collect</p>
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2	<p>Preferred method of communication for any questions we may have:</p> <p>€ Email - Email Address _____</p> <p>€ Telephone - Phone Number: _____</p> <p style="padding-left: 40px;">- Best Time to call : _____</p>
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3	<p>I wish to have my refund credited to my bank account Yes No</p> <p>Bank Details:</p> <p>Bank Name : _____</p> <p>BSB Number : _____</p> <p>Account Number: _____</p> <p>Account Name: _____</p>
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Income

4	<p>Please provide the following (please tick the documents you've attached or cross out if not applicable):</p> <p>€ Bank statements (to ascertain interest earned)</p> <p>€ Pay As You Go Summar(ies) (Group Certificates)</p> <p>€ Centrelink Pay As You Go Summary (if applicable)</p>
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5	<p>Was your employment terminated during the year in question? Yes No</p> <p>(If yes, ETP statement attached €)</p>
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6	<p>Did you receive any rental from investment properties? Yes No</p> <p>(If yes, agent's/rental statement attached €)</p>
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7	<p>Did you receive any dividends from shares held in your own name? (If yes, statements showing imputation credits attached €)</p>	Yes	No
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8	<p>Did you buy or sell assets in your own name? If yes, please provide details of transactions: _____ _____</p> <p>(If yes, buy/sell contracts attached €)</p>	Yes	No
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9	<p>Did you have any other income during the year including from investments eg managed funds? (If yes please briefly describe. Evidence of other income such as tax statement attached) _____ _____</p>	Yes	No
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Deductions

10	<p>Did you have any claimable work related expenses specific to your industry? (A list of the claimable expenses can be found on the ATO website) (If yes, summary of deductible expenses attached €)</p>	Yes	No
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11	<p>If you wore a uniform at work, do you have cleaning expenses to claim? (If yes, summary of cleaning expenses attached €)</p>	Yes	No
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12	<p>Do you have work related car expenses to claim? (If yes, record of km's traveled or log book attached €) Type of car: _____ 4cyl 6cyl 8cyl</p>	Yes	No
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13	<p>Did you incur expenses for study that was related to your work? (If yes, summary of expenses incurred attached €)</p>	Yes	No
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14	Did you make any donations over \$2 to charitable organizations? (If yes, summary of donations attached €)	Yes	No
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15	Did you incur any expenses in relation to your investments? eg interest on investment loan or costs of maintaining investment property (If yes, summary of expenses attached €)	Yes	No
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Offsets

16	Did you have private health insurance during the year in question? (If yes, annual membership statement attached €)	Yes	No
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17	Do you usually claim a family tax benefit? (If yes, please provide names and dates of birth of all children plus your spouse's income details - attached €)	Yes	No
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18	If you receive Family Tax Benefit and your children are either in primary or secondary school please provide us with your eligible education expenses. (A list of the eligible expenses can be found on the ATO website)		
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19	Did you make a superannuation contribution on behalf of your spouse? (If yes, details attached €)	Yes	No
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Other

20	Did you incur over \$2000 in medical expenses? (If yes, summary of medical expenses attached €)	Yes	No
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