

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: _____

Income

1	<p>Please provide the following (please tick the documents you've attached or cross out if not applicable):</p> <p style="padding-left: 40px;"> <input type="checkbox"/> € Bank statements (to ascertain interest earned) <input type="checkbox"/> € Pay As You Go Summar(ies) (Group Certificates) <input type="checkbox"/> € Centrelink Pay As You Go Summary (if applicable) </p>		
2	<p>Was your employment terminated during the year in question? (If yes, ETP statement attached €)</p>	Yes	No
3	<p>Did you receive any rental from investment properties? (If yes, agent's/rental statement attached €)</p>	Yes	No
4	<p>Did you receive any dividends from shares held in your own name? (If yes, statements showing imputation credits attached €)</p>	Yes	No
5	<p>Did you buy or sell assets in your own name?</p> <p>If yes, please provide details of transactions:</p> <p>_____</p> <p>_____</p> <p>(If yes, buy/sell contracts attached €)</p>	Yes	No

6	<p>Did you have any other income during the year including from investments eg managed funds?</p> <p>(If yes please briefly describe. Evidence of other income such as tax statement attached €)</p> <p>_____</p> <p>_____</p>	Yes	No
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Deductions

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

(If yes, summary of expenses attached €)

Offsets

14	Are you a sole parent?	Yes	No
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15	Are you a dependant spouse?	Yes	No
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(If yes, spouse income details \$_____ or parenting payment details attached €)

16	Did you have private health insurance during the year in question?	Yes	No
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(If yes, annual membership statement attached €)

17	Do you usually claim a family tax benefit?	Yes	No
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(If yes, please provide names and dates of birth of all children plus your spouse's income details - attached €)

18	Did you make a superannuation contribution on behalf of your spouse?	Yes	No
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(If yes, details attached €)

Other

19	Do you have a HECS debt?	Yes	No
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(If yes, HECS statement attached €)

20	Did you incur over \$1500 in medical expenses?	Yes	No
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(If yes, summary of medical expenses attached €)