Personal Tax Return - Personal, Family & Tax Offsets

Personal Details (To enable us to verify / update our records please complete all fields)

Name:
Date of Birth: **DD/MM/YYYY**
Tax File Number: (include only if we **have not** handled your tax affairs before)

Home Address: **Street Address**
State **P.Code**

Home Ph:
Work Ph:
Mobile:
Email:

Occupation:

Family Details

NOTE: These details are required to confirm your eligibility for Tax Offsets and complete your return. If your spouse does not have their tax completed by our office or is non-working please complete the details below.

Spouse Name:
Date of Birth: **DD/MM/YYYY**
Ph:
Spouse Income:

Dependant Details:	Name	Date of Birth
		DD/MM/YYYY
		DD/MM/YYYY
		DD/MM/YYYY
		DD/MM/YYYY

Does your Family Receive Family Tax Benefit ? ◯ Yes ◯ No

Tax Offsets & Rebates

From 2015–16 until 2018–19, claims for **MEDICAL EXPENSES** are restricted to expenses for disability aids, attendant care or aged care. (If you have any of these expenses please let us know)

Health Insurance - PLEASE provide annual rebate statement from your insurer

Other -

Personal Tax Return - Income Details

Ordinary Income

Salary & Wages Please provide your **PAYG summary** from all employers

Termination Payments Please provide details of any lump sum or termination payment

Government Benefits If you were the recipient of any **government benefits** such as Youth Allowance, Sickness Allowance, Newstart Allowance or any other taxable benefit please forward the payment summary issued by the provider.

Pension If you were the recipient of a **taxable pension** please forward the payment summary provided by the paying institution.

Investment Income

Interest Income	**Bank**	**Interest Amount**	**WHT**

Dividends	**Company Name**	**Unfranked**	**Franked**	**Tax Credit**	**WHT**

Note: ***Tax Credit*** *may also be* ***noted*** *on dividend statement as* ***Imputation Credit***

Partnership & Trust Income - Provide **annual tax statement** / distribution summary

Rental Income - Provide details required on **Rental Income & Expenses sheet**

Other Income

Business Income - Income and expense details need to be provided separately

Capital Gains

Description	Acquisition date and costs	Disposal date and proceeds

Other Income

Personal Tax Return - Work Related Deductions

Motor Vehicle

Cent per km Maximum kilometre claim is 5,000 km's under this method. Provide the number of km's travelled and the engine capacity of your vehicle. **Note: Travel between home and work is not eligible for a deduction.**

Km's: Engine Capacity:

Logbook Logbook must be maintained over 12 consecutive weeks.

Business use percentage for vehicle %

Fuel	Make of Vehicle
Insurance	Date of Purchase
Registration	Purchase Price
Repairs & Maint.	Interest on Loan
Car Washes	Lease Payments
Tyres	Depreciation (our office)

Uniform Expenses

Claims can be made for **occupation specific clothing**. This usually covers safety clothing and uniforms associated with your occupation. Claims can not be made for the purchase and maintenance of corporate clothing such as suits unless they have a company logo on them.

Self Education

A claim can be made for he costs of undertaking courses **related to your employment** including professional development. This extends to the cost of study materials such as stationery, computer expenses and home office expenses.

Other Work Related Deductions

Claims may be made for all costs you incurred related to the undertaking of your employment. If you are not certain of your eligibility, it is best to write down the expense and we can determine the right outcome. If you have purchased any equipment for work costing greater that $300 then we need to know the purchase price, date of purchase and percentage of work related use.

Continued next worksheet

Personal Tax Return - Work Related Deductions

Other Work Related Deductions - continued

Non Work Related Deductions

Tax & Accounting Fees. If our office assisted with your affairs last year then we will have these details on file.

Gifts and Donations. **Note: raffle tickets sold by charities are not deductible.**

Investment Deductions. Deductions associated with any investments, other than property, such as interest on borrowings for investment, bank fees and advisor fees.

Other Deductions

Rental Property Summary

Property Address

(Please copy a separate sheet for each rental property)

Full address of property **Street Address**

State **P.Code**

Date Purchased **DD/MM/YYYY**

Date First Rented (approximately) **DD/MM/YYYY**

Income - Annual Rental

(Please provide annual rental statement available from your rental agent)

		$	Office Use
	Rental Income		
	Other Income		

Expenses - Annual

(Provide annual amounts)

			$	Office Use
P	**Agent Fees/Commission**	*See Annual Statement*		
E	**Body Corporate**	*See Statements*		
V	**Connection Fees**	*Gas, electricity, phone, water*		
H	**Council Rates**	*See Rate Notices*		
I	**Depreciation - *Our Office***	*Calculated by our office*		
	Insurance			
K	**Landlord**			
K	**Building**			
L	**Interest on Investment Loan**	*See Loan Statements*		
V	**Bank Fees**			
F	**Borrowing Costs - *Our Office***	*Calculated by our office*		
M	**Land Tax**	*See Land Tax Notices*		
Q	**Repairs & Maintenance**			
R	**SBWO - *Our Office***	*Calculated by our office*		
U	**Water Rates**	*See Quarterly Notices*		
	Other	*Please Specify*		
V				
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Personal Tax Return - Comments & Questions

Use this page for any additional details regarding your income and deductions

If you have any queries about your tax, lending, personal superannuation or property we would be glad to help

Office Use