TAX RETURN

**EOFY INFORMATION**

INDIVIDUAL TAX RETURN

1. To ensure that our records are up to date, please provide us with any update to your address, email or phone details or changes to your bank details for ATO refunds.
2. Please complete your details below to the best of your knowledge
3. Provide all supporting documents where prompted and applicable.

**GENERAL TAX INFORMATION**

**Children**

|  |  |
| --- | --- |
| NAME | D.O.B. |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |

**Income Statements / PAYG Payment Summaries** (please attach all documents)

(If your employer is registered for STP (Single Touch Payroll) you will not receive a payment summary and you can access your income amounts via your myGov account)

|  |  |  |  |
| --- | --- | --- | --- |
| EMPLOYER | OCCUPATION | GROSS | TAX |
|  |  | $ | $ |
|  |  | $ | $ |
|  |  | $ | $ |
|  |  | $ | $ |
|  |  | $ | $ |

**Bank Interest**

|  |  |  |  |
| --- | --- | --- | --- |
| BANK | AMOUNT | TFN CREDITS | BANK CHARGES |
|  | $ | $ | $ |
|  | $ | $ | $ |
|  | $ | $ | $ |
|  | $ | $ | $ |
|  | $ | $ | $ |

**Work & Other Expenses** (please attach your detailed listing)

|  |  |  |  |
| --- | --- | --- | --- |
| EXPENSE TYPE | AMOUNT | EXPENSE TYPE | AMOUNT |
| Taxi Fares | $ | Reference Books | $ |
| Other Travel | $ | Stationery | $ |
| Uniform / Laundry | $ | Mobile Phone | $ |
| Sun Protection Items | $ | Internet | $ |
| Self-Education | $ | Memberships | $ |
| Union Fees | $ | Tools & Equipment | $ |
| Seminars / Prof Development | $ | Interest Expenses | $ |
| Gifts & Donations | $ | Income Protection Insurance | $ |
| Other Expenses | $ | *(please include in detailed listing)* | |
| Home Office Claim – COVID19 | Number of days working from home: | | |

**Private Health Insurance**

|  |  |  |
| --- | --- | --- |
| Do you have private health insurance? | Y  N | ***YES*** *- please provide your Private Health Statement (Your Private Health Insurer may not supply you with a summary statement as the ATO have advised these are no longer compulsory)* |
| Do you have any of these items?  Investment Income, Rental Properties, Investments Sold or Motor Vehicles used for Work | Y  N | ***YES*** *- please complete relevant sections below* |

**INVESTMENT INFORMATION**

**Dividends**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| COMPANY | DATE PAID | UNFRANKED | FRANKED | IMP. CREDITS | TFN CREDITS |
|  |  | $ | $ | $ | $ |
|  |  | $ | $ | $ | $ |
|  |  | $ | $ | $ | $ |
|  |  | $ | $ | $ | $ |
|  |  | $ | $ | $ | $ |

**Unit Trusts**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| TRUST | TRUST INCOME | TFN CREDITS | IMP. CREDITS | CAPITAL GAINS | FOREIGN INCOME | FOREIGN TAX |
|  | $ | $ | $ | $ | $ | $ |
|  | $ | $ | $ | $ | $ | $ |
|  | $ | $ | $ | $ | $ | $ |
|  | $ | $ | $ | $ | $ | $ |
|  | $ | $ | $ | $ | $ | $ |

**Investments Sold / Disposed**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| COMPANY / TRUST | DATE SOLD | NO. SOLD | AMOUNT RECEIVED | DATE PURCHASED | NO. PURCHASED | AMOUNT PAID |
|  |  |  | $ |  |  | $ |
|  |  |  | $ |  |  | $ |
|  |  |  | $ |  |  | $ |
|  |  |  | $ |  |  | $ |
|  |  |  | $ |  |  | $ |

**MOTOR VEHICLE INFORMATION**

**Vehicle & Log Book**

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **LOGBOOK KEPT** | Y  N | | | | **PERIOD COVERED BY LOGBOOK** *(within last 5 financial years)* | | | |  |
| **VEHICLE PLATE NO.** | |  | | | | **MAKE & MODEL** |  | | |
| **OWNER OF VEHICLE** | |  | | | | **DRIVE OF VEHICLE** |  | | |
| **TOTAL KMs TRAVELLED IN YEAR** | | | |  | | **BUSINESS KMs IN LOGBOOK PERIOD** | |  | |
| **DATE PURCHASED** | |  | | | | **PURCHASE PRICE** | $ | | |
| **HOW WAS VEHICLE FINANCED?** | | | | Lease  Paid Cash  Chattel Mortgage  Hire Purchase | | | | | |
| **DATE SOLD** *(if in this tax year)* | | |  | | | **SALE PRICE** | $ | | |

**Running Costs**

|  |  |  |
| --- | --- | --- |
| COST TYPE | ANNUAL AMOUNT (inc. GST) | MONTHLY PAYMENTS |
| Fuel / Oil | $ | *Please provide a copy of your Hire Purchase / Lease / Chattel Mortgage Agreement.* |
| Registration | $ |
| Insurance | $ |
| Repairs & Maintenance | $ |
| Lease Payments | $ | $ |
| Hire Purchase / Chattel Mortgage Payments | $ | $ |
| Interest Paid | $ | $ |
| Services | $ | $ |
| Tyres / Battery | $ | $ |
| Membership Fees | $ | $ |
| Parking & Tolls | $ | $ |

**RENTAL PROPERTY INFORMATION** *Please complete one of these schedules per Property.*

**Property Details**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **ADDRESS OF RENTAL PROPERTY** | |  | | | |
| **DATE PURCHASED** |  | | **DATE RENTAL INCOME FIRST EARNT** | |  |
| **NO. WEEKS AVAILABLE FOR RENT** *(this year)* | | |  | **DATE BUILT** |  |
| **OWNERSHIP DETAILS** | | In your name  In joint names *(please provide details)* | | | |

*Please provide the purchase settlement statement and other purchase costs, e.g. stamp duty, legal fees, renovations or initial repairs, and any loan application fees and/or mortgage discharge expenses.*

**Income**

|  |  |
| --- | --- |
| GROSS RENT | OTHER RENTAL INCOME |
| $ | $ |

**Expenses**

|  |  |  |  |
| --- | --- | --- | --- |
| EXPENSE TYPE | AMOUNT | EXPENSE TYPE | AMOUNT |
| Advertising for Tenants | $ | Stationery, Phone & Postage | $ |
| Borrowing Expenses | $ | Cleaning | $ |
| Council Rates | $ | Gardening / Lawn Mowing | $ |
| Insurance | $ | Interest on Loan(s) | $ |
| Land Tax | $ | Legal Fees | $ |
| Pest Control | $ | Property Management Fees | $ |
| Repairs & Maintenance | $ | Property Man. Commissions | $ |
| Body Corporate Fees | $ | Other Expenses | $ |
| Water Charges | $ |  |  |

**Depreciable Items**

| ITEM | DATE PURCHASED | COST |
| --- | --- | --- |
|  |  | $ |
|  |  | $ |
|  |  | $ |
|  |  | $ |
|  |  | $ |
|  |  | $ |
|  |  | $ |
|  |  | $ |
|  |  | $ |
|  |  | $ |
|  |  | $ |

**Improvements / Construction Costs** *Please provide a copy of your tax depreciation schedule prepared by third party below.*

| ITEM | DATE | COST |
| --- | --- | --- |
|  |  | $ |
|  |  | $ |
|  |  | $ |
|  |  | $ |
|  |  | $ |
|  |  | $ |
|  |  | $ |
|  |  | $ |
|  |  | $ |
|  |  | $ |
|  |  | $ |

|  |
| --- |
| **OTHER INFORMATION** *Please list any other information that you believe may assist us* |
|  |
|  |
|  |
|  |
|  |
|  |
|  |
|  |

**SUPPORTING DOCUMENT CHECKLIST**

□ Income Statement from your myGov Account / Payment Summaries

□ Detailed Work Expenses Listing

□ Private Health Statement (Optional)

□ Out of Pocket Medical Expense Claims

□ Unit Trust Tax Year Summary

□ Motor Vehicle Hire Purchase / Lease / Chattel Mortgage Agreement

□ Rental Property Purchase Settlement Statement / Costs

□ Rental Property Depreciation Schedule (as prepared by Third Party)

□ Letter noting tax deductibility of Income Protection Premiums

□ Confirmation letter from your superannuation fund noting intent to claim tax deduction for contributions