

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: _____
 Tax File Number: _____ (include only if we **have not** handled your tax affairs before)
 Home Address _____

 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: _____
 Ph: _____
 Spouse Income: _____

Dependant Details:	Name	Date of Birth
	_____	_____
	_____	_____
	_____	_____

Does your Family Receive Family Tax Benefit Yes No (Circle)

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 the 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 than \$300 then we need to know the purchase price, date of purchase and percentage of work related use.

Continued next worksheet

Rental Property Summary

Property Address	<i>(Please copy a separate sheet for each rental property)</i>
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Full address of property _____

Date Purchased _____
 Date First Rented (approximately) _____

Income - Annual Rental	<i>(Please provide annual rental statement available from your rental agent)</i>
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	\$	Office Use
Rental Income	_____	_____
Other	_____	_____

Expenses - Annual	<i>(Provide annual amounts)</i>
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	\$	Office Use
P Agent Fees/Commission <i>See Annual Statement</i>	_____	_____
E Body Corporate <i>See Statements</i>	_____	_____
V Connection Fees <i>Gas, electricity, phone, water</i>	_____	_____
H Council Rates <i>See Rate Notices</i>	_____	_____
I Depreciation - Our Office <i>Calculated by our office</i>	_____	_____
Insurance		
K Landlord	_____	_____
K Building	_____	_____
L Interest on Investment Loan <i>See Loan Statements</i>	_____	_____
V Bank Fees	_____	_____
F Borrowing Costs - Our Office <i>Calculated by our office</i>	_____	_____
M Land Tax <i>See Land Tax Notices</i>	_____	_____
Q Repairs & Maintenance	_____	_____
R SBWO - Our Office <i>Calculated by our office</i>	_____	_____
U Water Rates <i>See Quarterly Notices</i>	_____	_____
Other <i>Please Specify</i>	_____	_____
V _____	_____	_____

Comments / Queries
