

## 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
---	-----	----

### 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

<b>Salary &amp; Wages</b>	Please provide your <b>PAYG summary</b> from all employers
<b>Termination Payments</b>	Please provide details of any lump sum or termination payment
<b>Government Benefits</b>	If you were the recipient of any <b>government benefits</b> such as Youth Allowance, Sickness Allowance, Newstart Allowance or any other taxable benefit please forward the payment summary issued by the provider.
<b>Pension</b>	If you were the recipient of a <b>taxable pension</b> 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 &amp; 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*

## 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

Date Purchased

Date First Rented (approximately)

### Income - Annual Rental

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

Rental Income	\$	Office Use
---------------	----	------------

### 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 - <i>Our Office</i>	Calculated by our office	
	Insurance		
K	Landlord		
K	Building		
L	Interest on Investment Loan	See Loan Statements	
V	Bank Fees		
F	Borrowing Costs - <i>Our Office</i>	Calculated by our office	
M	Land Tax	See Land Tax Notices	
Q	Repairs & Maintenance		
R	SBWO - <i>Our Office</i>	Calculated by our office	
U	Water Rates	See Quarterly Notices	
	Other	Please Specify	
V			
V			
V			
V			
V			
V			

## 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