

2023 Personal Tax Return Information Sheet

Personal Information

Your surname	
Your given names	
Your date of birth	/ /
Postal address	
Residential address (If different to postal address)	
Your occupation	
Mobile number	
Home phone number	
e-mail address	
Bank account details (NOTE: If you are expecting a refund, the ATO no longer issue refund cheques)	Account name: BSB: Account number:
Did you have a spouse for the full financial year? (Married, de facto, same sex)	Yes <input type="checkbox"/> No <input type="checkbox"/>
If no, period you had a spouse	From / / to / /
Spouse's surname	
Spouse's given names	
Spouse's date of birth	
Is this the first time we are doing your tax return? If yes, please provide copies of the prior year tax returns done for yourself and your spouse.	Yes <input type="checkbox"/> No <input type="checkbox"/>
If we are not doing your spouse's tax return, please advise the spouse's taxable income, in the current year.	\$
Please fill-out details about your dependent children (Dependent child is a child who is under 21 years old, or 21 to 24 years old, and a full-time student)	
Date of Birth	Full name

Income

1. Did you receive PAYG payment Summaries from your employer?	Yes <input type="checkbox"/> No <input type="checkbox"/>
<p>If no, your employer would have lodged your pay details via STP to the ATO. We can access this information on your behalf. Please go to question 2.</p> <p>If yes, we need copies of all payment summaries for wages, allowances, earnings, tips or director's fees, lump sum payments (both employer & superannuation), employment termination payment, Australian Government pensions & allowances (Newstart, Austudy...etc.), annuities and superannuation income streams. For income streams, we also need any letter(s) and schedule(s) sent to you by the provider with your payment summary.</p>	
2. Did you receive or reinvest any Interest?	Yes <input type="checkbox"/> No <input type="checkbox"/>
<p>If no, go to question 3.</p> <p>If yes, please provide the end-of-year interest summary statement, obtained from your bank /financial institution.</p>	
3. Did you receive or reinvest any dividends from shares held?	Yes <input type="checkbox"/> No <input type="checkbox"/>
<p>If no, go to question 4.</p> <p>If yes, please provide all dividend/distribution/tax statements received during the financial year.</p> <p><i>Dividends reinvested must be declared as income, even though you didn't receive any money.</i> <i>Dividends are assessable in the year of payment.</i></p>	
4. Did you receive distributions from partnerships, trusts or managed funds?	Yes <input type="checkbox"/> No <input type="checkbox"/>
<p>If no, go to question 5.</p> <p>If yes, please provide the annual tax statement of distributions from each entity.</p> <p><i>Managed funds are investments in unit trusts such as BT, Colonial, and MLC etc.</i></p>	
5. Did you sell any assets? (Property, shares, cryptocurrency, etc....)	Yes <input type="checkbox"/> No <input type="checkbox"/>
<p>If no, go to question 6.</p> <p>If yes, please provide the following documents.</p> <ul style="list-style-type: none">➤ Documents showing the date and value of the asset purchased➤ Documents showing the date and value of the asset sold➤ Documents relating to any incidental costs➤ For managed funds/cryptocurrency, we need the tax statement from the fund manager/exchange or documents showing cost and sale amounts for all units sold/swops. <p><i>If you sold assets such as shares, cryptocurrency, units in trusts or property which were acquired after 20 September 1985, you may have to pay capital gains tax (CGT). Your main residence is exempt from CGT, provided it was not used to produce income.</i></p>	
6. Did/Do you own a rental property/properties?	Yes <input type="checkbox"/> No <input type="checkbox"/>
<p>If no, go to question 7.</p> <p>If yes, we need the following documents please.</p> <ul style="list-style-type: none">• Rental Agent annual summary statement• Property bank loan statements/transaction history covering full financial year• Council, water rates notices and repairs or maintenance invoices• Property/landlord insurance details• Depreciation schedule (If not provided before)• Solicitor's letter including settlement documents if the property was purchased/sold during the year• Any other information if you think that may be relevant	

7. Did you receive income/loss from a business as a sole trader?	Yes <input type="checkbox"/> No <input type="checkbox"/>
<p>If no, go to question 8.</p> <p>If yes, please provide us with either your cashbook/MYOB file or a summary of income and expenses, receipts, workpapers etc. including GST calculations if you are a GST-registered business and business bank statements.</p>	
8. Did you receive any other income not referred to above?	Yes <input type="checkbox"/> No <input type="checkbox"/>
<p>If no, go to question 1 under Deductions.</p> <p>If yes, please provide details.</p> <p><i>Other income refers to foreign income, pensions, bonuses from life insurance companies or friendly societies, income from forestry managed investment schemes, jury services, amounts for lost salary or wages paid under an income protection or sickness and accident policy or workers compensation scheme and discounts on shares or rights acquired under an employee share scheme. For the latter, we will need your employee share scheme statement obtained by your employer.</i></p>	
9. Did you receive allowances and payments from the Australian Government?	Yes <input type="checkbox"/> No <input type="checkbox"/>
<p>If no, go to question 8.</p> <p>If yes, please provide details.</p> <p><i>Government payments includes but not limited to government grants, Jobseeker payment, Youth allowance, Austudy payment, parenting payment, partner allowance, sickness allowance, special benefit, widow allowance...etc Please provide your PAYG payment summary or a letter from the agency that paid your allowance or payment stating the amount you received</i></p>	

Deductions

NOTE: Please have invoices/documents to substantiate your expenses.

1. Did you use your car for work and keep a log book?	Yes <input type="checkbox"/> No <input type="checkbox"/>	
<i>**Please refer to the attachment regarding car expenses, at the end of this form.</i>		
<p>If no, go to question 2.</p> <p>If yes, you are entitled to claim the cost of using your car for work based on a log book kept for a continuous period of 12 weeks within the last five years, provided that the usage remains the same. Insert details of your car here and go to question 3.</p> <p><i>**Please send loan or lease agreement if this is the first year of your claim or you are a new client</i></p>	Vehicle Make and Model:	
	Business Use %	
	Purchase date	
	Purchase cost Incl. GST	
	Registration	
	Insurance	
	Tyres & Batteries	
	Lease Interest Paid	
	Fuel & Oil	
	Servicing & Repairs	
2. Did you use your car for work, but NOT keep a log book?	Yes <input type="checkbox"/> No <input type="checkbox"/>	
<p>If no, go to question 4.</p> <p>If yes, insert the details of your car here and go to question 3.</p>	Vehicle Make and Model:	Business kms travelled:
	Vehicle Make and Model:	Business kms travelled:
<p>Note: Please <u>exclude trips between home and your normal place of work</u>. You are entitled to claim the cost of using your car for work based on a <u>reasonable estimate</u> of the kilometers travelled up to a maximum of 5,000kms per car. You must have records of trips and distance traveled to substantiate.</p>		

3. Please explain how you used your car for work:

**** Important**

4. Did you incur work-related travel expenses?

Yes No

***Please refer to the attachment regarding travel expenses, at the end of this form.*

If no, go to question 5

If yes, please record details.

Taxis		Parking	
Buses		Meals	
Trains		Airfares	
Accommodation		Other	

5. Did you incur work-related clothing expenses?

Yes No

If no, go to question 6

If yes, please record details.

*Please note that you cannot generally claim a deduction for **conventional everyday work clothing**.*

Compulsory Uniform	\$	Dry Cleaning (Uniforms)	\$
Non-Compulsory Uniform	\$	Home Laundry	washes/week
Occupation Specific	\$	<i>Home laundry of uniforms or protective clothing only.</i>	
Protective Clothing	\$	Sun glasses	\$
Work Boots	\$	Other	\$

6. Did you incur work related self-education expenses?

Yes No

If no, go to question 8.

If yes, you can claim a deduction where the course of study is to maintain/increase skills in current employment.

***Please refer to the attachment regarding self-education expenses, at the end of this form.*

Course description			
Name of school, institute or university			
Date commenced		/ /	
Date finished		/ /	
Fees (not HELP)	\$	Kilometers Travelled	\$
Text Books	\$	Make/Model of Car	\$
Stationery	\$	Other	\$

7. Please explain how your course relates to your employment:

**** Important**

8. Did you incur any other work-related expenses?

Yes No

If no, go to question 9

If yes, please enter details

Union Fees	\$	Safety Equipment	\$
Professional Subscriptions	\$	Stationery	\$
Conferences/Seminars	\$	Other	\$

Please list all work-related equipment/software purchases:			
Cost	Description	Date of Purchase	Work use%
\$			%
\$			%
\$			%
\$			%
\$			%
Please complete below, if you incurred any of the following expenses, for work & NOT using the shortcut method (80c/hour) to calculate the cost of working from home.			
	Details of usage	Amount	Work use%
Mobile Phone			%
Internet			%
Other			%
Please complete below if you worked from home, in the last financial year:			
Period		Number of hours per week	
Did you have a dedicated work area such as a home office, when working from home?		Yes <input type="checkbox"/> No <input type="checkbox"/>	
<i>**Please refer to the attachment regarding Home-office expenses, at the end of this form.</i>			
9. Did you pay interest on investment loans (Excl. rental properties)?		Yes <input type="checkbox"/> No <input type="checkbox"/>	
If no, go to question 10			
If yes, please provide the end-of-year interest summary statements and bank statements covering the full year, obtained from your bank /financial institution.			
10. Did you make donations to charities or school building funds?		Yes <input type="checkbox"/> No <input type="checkbox"/>	
If no, go to question 11		\$	
If yes, please complete these details or attach a list. Receipts will confirm whether the donation is deductible.		\$	
		\$	
11. Did you have any other deductions not referred to above?		Yes <input type="checkbox"/> No <input type="checkbox"/>	
If no, go to next question		Income protection insurance	
If yes, please provide details.		Last year's tax return fee (If not prepared by us)	
		\$	
		\$	
12. Did you make personal superannuation contributions?		Yes <input type="checkbox"/> No <input type="checkbox"/>	
If no, go to the next section.			
If yes, please provide details. <i>To claim a deduction for personal super contributions, you must notify the fund and receive a written acknowledgement of your intention to claim the deduction.</i>		Amount Contributed \$	

Medicare Levy Related Items

1. Did you have private patient hospital cover?	Yes <input type="checkbox"/> No <input type="checkbox"/>
If no , go to question 3. If yes , please state what type of cover did you have? Single, family...etc.	
2. If you have private patient hospital cover, were all of your dependents (including your spouse if applicable) covered for the whole of the year?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Comments:	

Tax Offsets

1. Did you make superannuation contributions for your spouse?	Yes <input type="checkbox"/> No <input type="checkbox"/>		
If no , go to question 4. If yes , please provide details.	Amount Contributed \$		
2. Did you live in a remote area of Australia or serve overseas forces?	Yes <input type="checkbox"/> No <input type="checkbox"/>		
If no , go to question 5. If yes , please provide details. <i>If you lived in a remote or isolated area of, served overseas as a member of Australia's Defense Forces or as a civilian with UN armed forces.</i>	Location	Period From	Period To
1. Did you receive foreign income and pay foreign tax on that income?	Yes <input type="checkbox"/> No <input type="checkbox"/>		
If no , go to question 4. If yes , please provide payment summary details. <i>You may be able to claim a foreign income tax offset, if you have included the foreign income as assessable income and actually paid an amount of foreign income tax.</i>			

Other

1. Do you have a HELP or SFSS Debt?	Yes <input type="checkbox"/> No <input type="checkbox"/>
If no , go to question 2. If yes , please provide details here.	HELP balance at 30 June \$ SFSS balance at 30 June \$
2. Other amounts required for income test purposes	Yes <input type="checkbox"/> No <input type="checkbox"/>
Tax free government pensions received by you	\$
Child support payments made by you	\$
3. Are you a new client to our practice?	Yes <input type="checkbox"/> No <input type="checkbox"/>
If no , go to question 4. If yes , please send us a copy of your last lodged tax return.	

4. Please write here any other information about your return

I declare that the information I provided in this form is true and correct, for the best of my knowledge. Please sign and date below.

Name

Signature

___/___/___

Date