

Income Tax Return

Details

Name

Date of Birth

Address

Tax File Number

Mobile

Email

Net Asset Summary ☐ Y ☐ N

Capital Work Sheet Update ☐ Y ☐ N

Bank Details

Occupation

Partner Details

Resident for full year ☐ Y ☐ N

Date of Birth

Sex

Taxable Income

Dependent Children

Please attach and/or write details if answered (Y)

1. Salary or Wages

☐ Y ☐ N

2. Allowances /Director Fees/Tips

☐ Y ☐ N

3. Employer Lump sum Payments

☐ Y ☐ N

4. Employment Termination Payments

☐ Y ☐ N

5. Australian Government Allowances

☐ Y ☐ N

Income Tax Return

6. Australian Government Pensions ☐ Y ☐ N

7. Australian Annuities or Super Streams ☐ Y ☐ N

8. Australian Super Lump Sum Payments ☐ Y ☐ N

9. Attributed Personal Services Income ☐ Y ☐ N

10. Gross Interest ☐ Y ☐ N

11. Dividends ☐ Y ☐ N

12. Employee Share Schemes ☐ Y ☐ N

13. Distribution from Partnership and Trusts ☐ Y ☐ N

14. Personal Services Income ☐ Y ☐ N

16. Deferred Non-commercial Business Losses ☐ Y ☐ N

17. Net Farm Management Deposits or Repayment ☐ Y ☐ N

18. Capital gains ☐ Y ☐ N

19. Foreign Entities ☐ Y ☐ N

20. Foreign Source Income and Assets ☐ Y ☐ N

21. Bonuses from Life Insurance ☐ Y ☐ N

22. Forestry Management Income Scheme ☐ Y ☐ N

23. Any Other Income not classified above ☐ Y ☐ N

Income Tax Return

Deductions

Please attach and/or write details if answered (Y)

D1. Work Related Car Expenses ☐ Y ☐ N

D2. Work Related Travel Expenses ☐ Y ☐ N

D3. Work Related Uniform and Laundry ☐ Y ☐ N

D4. Self-Education Expenses ☐ Y ☐ N

D5. Other Work Related Expenses ☐ Y ☐ N

D5. Other Work Related Expenses ☐ Y ☐ N

☐ Telephone ☐ Depreciation ☐ Internet ☐ Computer

☐ Bag ☐ Seminars/ Conferences ☐ Printing & Stat ☐ Subscriptions

☐ Home Office *Hours worked - 1 July 20 - 30 Jun* ☐ Union Fees ☐ Tools and Equipment

☐ Any Other Work Related Expenses not above (e.g. Purchase of stationary/equipment/computer/ phone to claim?)

D6. Low Value Pool Deduction ☐ Y ☐ N

D7. Interest Deduction ☐ Y ☐ N

D8. Dividend Deduction ☐ Y ☐ N

D9. Donations ☐ Y ☐ N

D10. Cost of Managing Tax Affairs /Audit Insurance ☐ Y ☐ N

D11. Deductible Amount of UPP ☐ Y ☐ N

Income Tax Return

D12. Personal Super Contribution ☐ Y ☐ N

D13. Deduction for Project Pool ☐ Y ☐ N

D14. Forestry Managed Investment Scheme ☐ Y ☐ N

D15. Other Deductions (e.g. Income Protection) ☐ Y ☐ N

Offsets

Please attach and/or write details if answered (Y)

T1. Seniors and Pensioners ☐ Y ☐ N

T2. Australian Super Income Stream ☐ Y ☐ N

T3. Super Contributions on behalf of Your Spouse ☐ Y ☐ N

T4. Zone or Overseas Forces ☐ Y ☐ N

T5. Medical Expenses ☐ Y ☐ N

T6. Invalid Carer ☐ Y ☐ N

T7. Landcare and Water Facility ☐ Y ☐ N

T8. Early Stage Venture Capital Limited Partnership ☐ Y ☐ N

T9. Early Stage Investor ☐ Y ☐ N

T10. Other Non-refundable Tax Offsets ☐ Y ☐ N

T11. Other Refundable Tax Offsets ☐ Y ☐ N

Income Tax Return

15. Net Income or Loss from Business

☐ Y ☐ N

ABN

ABR

Deferred Loss from Prior Year

Address

Business Income

Sales Revenue

Interest Income

Other Income

Business Expenses

Purchases and Other Costs

Cost of Sales

Foreign Resident

Contractors

Superannuation

Bad Debts

Lease Expenses

Rent Expenses

Interest within Australia

Interest Overseas

Depreciation Expenses

Motor Vehicle Expenses:

Vehicle Make and Model

Business Usage %

Repairs and Maintenance

Other Expenses

Income Tax Return

21. Rental Property Details

☐ Y ☐ N

Address

Suburb

Postcode

Rent Received

Available for Rent – Full Year

☐ Y ☐ N

Date of First Rental Income

Purchases Price

Date of Purchase

Land Tax

Capital Works

Legal fees

Interest on Loans

Depreciation

Advertising

Travel

Gardening

Agent Commission

Stationery

Internet

Repairs

Council Rates

Body Corporate Fees

Cleaning

Water Rates

Any Capital Repairs

Other Sundry Expenses

Income Tax Return

M1. Medicare Levy Reduction or Exemption ☐ Y ☐ N

M2. Private Health Insurance ☐ Y ☐ N

L1. Losses from Previous years ☐ Y ☐ N

IT1. Reportable Fringe Benefits ☐ Y ☐ N

IT2. Reportable Employer Super Contribution ☐ Y ☐ N

IT3. Reportable Employer Super Contribution ☐ Y ☐ N

IT4. Target Foreign Income ☐ Y ☐ N

IT5. Net Financial Investment Loss ☐ Y ☐ N

IT6. Net Rental Property Loss ☐ Y ☐ N

IT7. Child Support ☐ Y ☐ N

IT8. Number of dependent Children ☐ Y ☐ N

HELP Debt ☐ Y ☐ N

PAYG Instalments ☐ Y ☐ N

Spouse ☐ Y ☐ N

Prepared by

Date

Reviewed by

Date