

Client details – 20__ individual income tax return

Client name
 Address
 Telephone no Fax no.....
 Email address
 What is your occupation?
 Dependants? YES/NO
 Any new dependants?

Full Names	Date of birth	Bank Account
.....	BSB
.....	Account.....

Salary and wages 1

Occupation	Employer

Payment summary attached? YES/NO

Details of work related expenses

Date incurred	Description	Amount

Details of interest received

Bank	Branch	Account number	Amount	Joint names?

Details of dividends received

Company	Date Paid	Unfranked dividends	Franked dividends	Franking credits	TFN Amount

Client details – 20__ individual income tax return

Managed Funds

Please provide annual tax summary

Dated the day of 20.....

.....
Signature of taxpayer

Please circle YES or NO for each of the items listed below:

INCOME – Please provide evidence

- 1. Salary or wages YES/NO
- 3. Employer lump sum payments YES/NO
- 4. Employment termination payments YES/NO
- 5. Australian Government allowances and payments like newstart, youth allowance and austudy payment YES/NO
- 6. Australian Government pensions and allowances (*including tax free pensions*)..... YES/NO
- 7. Australian annuities and superannuation income streams YES/NO
- 8. Australian superannuation lump sum payments YES/NO
- 10. Interest *Please completed attached schedule*..... YES/NO
- 11. Dividends *Please complete attached schedule*..... YES/NO
- 13. Distributions from partnerships and/or trusts YES/NO
- 15. Net income or loss from business (*please refer business checklist*)..... YES/NO
- 18. Net capital gains *If you sold shares/property during the year please contact our office*..... YES/NO
- 19. Direct or indirect interests in controlled foreign entities YES/NO
- 20. Foreign source income (including foreign pensions) and foreign assets or property YES/NO
- 21. Rent YES/NO
- 22. Bonuses from a life insurance company or friendly society policy YES/NO
- 23. Forestry managed investment scheme income YES/NO
- 24. Other income (please specify) YES/NO

DEDUCTIONS – Please provide evidence

D1. Work related car expenses

- *Please provide details of car km’s travelled or M/V log book*.....YES.NO
- *Receipts for expenses or summary required*

D2. Work related travel expenses

- Employee domestic travel with reasonable allowance YES/NO
- Overseas travel with reasonable allowance *Please provide summary of purpose of travel and* YES/NO
- Costs incurred.....
-
- Other work related travel expenses (e.g., a borrowed car).....YES/NO
-

D3. Work related uniform and other clothing expenses

- Protective clothing *Uniforms etc* YES/NO
- Occupation specific clothing Dry cleaning expenses YES/NO

Client details – 20__ individual income tax return

D4. Work related self-education expenses

Course taken at educational institution:

- union feesYES/NO depreciationYES/NO
- course fees.....YES/NO books stationary.....YES/NO
- seminarsYES/NO travel.....YES/NO
- other (please specify)YES/NO
-
-

D5. Other work related expenses

- Home office expensesYES/NO Computer and SoftwareYES/NO
 - Telephone/Mobile PhoneYES/NO Tools and equipmentYES/NO
 - Subscriptions and union feesYES/NO Journals/Periodicals.....YES/NO
 - DepreciationYES/NO Sun protection (glasses etc.....YES/NO
- Seminars and courses not at an educational institution:
- Course feesYES/NO travel.....YES/NO
- Any other work related deductions (please specify)YES/NO
-

Other types of deductions

- D6. Low Value Pool Deduction.....YES/NO
- D7/D8. Interest and dividend deductions YES/NO
- D9. Gifts or donations YES/NO
- D10. Cost of managing tax affairs YES/NO
- D12. Personal superannuation contributions..... YES/NO
- Full name of fund:..... Account Number.....
- D14. Forestry managed investment scheme deduction YES/NO
- D15. Income Protection Insurance.....YES/NO
- D15. Other deductions (please specify) YES/NO

Tax offsets/rebates

- T1. Do you have a dependent spouse (without dependent child or student), a housekeeper or a child-housekeeper?..... YES/NO
- T3. Did you receive a superannuation income stream? YES/NO
- T4. Did you make superannuation contributions on behalf of your spouse? YES/NO
- T5. Did you live in a remote area of Australia or serve overseas with the Australian defence force or the UN armed forces?..... YES/NO
- T7. Did you maintain a parent, spouse’s parent, invalid spouse, carer spouse, or invalid relative?.....YES/NO
- T14. Other tax offsets (please specify) YES/NO
-

Other relevant information

- A. Are you entitled to the Medicare levy exemption or reduction in 2013? YES/NO
- (If yes, please specify):
-
-

Client details – 20__ individual income tax return

B. Did you receive any benefit from an employee share acquisition scheme?..... YES/NO

Details

.....

Please provide HIN/SRN for each share acquisition scheme

Please provide documentation relating to the issue of employer shares or any associated loans

C. Did you receive any child support payments for the year?.....YES/NO

(attach details)

D. Do you make any after tax superannuation contributions or have any ATO Co-Contributions to claim?.....YES/NO

(attach details)

E. Do you have a HECS/HELP liability or a student financial supplement loan debt?.....YES/NO

F. Did a trust or company distribute income to you in respect of which family trust distribution tax was paid

By the trust or company?.....YES/NO

G. Do you have a loan with a private company or have such a loan amount forgiven?.....YES/NO

(if yes, please specify) – (reviewer consider if assessable in year):

.....

Spouse Details – These details must be completed in full unless your spouse has completed a separate checklist.

Spouse financial Information	Amount
Spouses annual taxable income	
Your spouse's section 98 trust income – not included in spouses taxable income	
Distributions to spouse on which family trust distribution tax has been paid	
Your spouse's total reportable fringe benefits amounts	
Amount of any Australian Government pensions and allowances received by your spouse this year	
Exempt pension income received by spouse this year	
Your spouse's superannuation contributions	
Your spouse's amount of any tax-free government pensions paid under the military Rehabilitation and compensation act 2004 that have not been included at Q above	
Your spouse's target foreign income	
Your spouse's total net investment loss	
Child support your spouse paid	
Taxed element of a superannuation lump sum for which the tax rate is zero	
Spouse's total ATI	

Dated the day of20.....

Signature of taxpayer **Name (print)**.....