



## CLIENT DETAILS FORM

### Individual Tax Return

Year 20\_\_

<b>Full Name</b>	
<b>ABN (if applicable)</b>	
<b>Address</b>	
<b>Address (postal) (or "as above")</b>	
<b>Telephone</b>	Mobile:
	Business Hours (work):
	After Hours (home):
<b>Email</b>	@
<b>Occupation</b>	
	Do you run your own business as a sole trader? <b>YES/NO</b>
	Do you run your own business in a company, trust or partnership? <b>YES/NO</b>
<b>Partner's Full Name</b>	
<b>Partners Approx Income (if known) required for Medicare Levy calculations</b>	\$

Please note that for all sections you must hold evidence of your claim & information to satisfy the ATO requirements.

Income				
Salary or wages – you are <b>not</b> required to provide this information if it is shown on your myGov account. If you have been provided with hard/electronic copies, please provide.				
<b>Where you have not been provided with either an employment income statement or PAYG Payment Summary, please provide details below:</b>				
	<b>Payer's ABN</b>	<b>Gross Payment</b>	<b>Tax Withheld</b>	
<b>A</b>				
<b>B</b>				
			<b>Yes -</b>	<b>No</b>
				<b>Unsure</b>
1.	Allowances, earnings, tips, director's fees etc.			
2.	Employer lump sum payments			
3.	Employment termination payments			
4.	Australian Government allowances and payments like Newstart, Youth Allowance and Austudy payments			
5.	Australian Government pensions and allowances			
6.	Australian annuities and superannuation income streams			
7.	Australian superannuation lump sum payments			
8.	Attributed personal services income			
9.	<b>Gross Interest</b>			
	<b>Bank Name</b>	<b>Account # last 5 digits</b>	<b>Amount</b>	<b>Joint Account?</b>
	a) .....			.....
	b) .....			.....
	c) .....			.....
10.	Dividends			
11.	Employee share schemes			
12.	Distributions from partnerships and/or trusts			
13.	Personal services income (PSI)			
14.	Net income or loss from business (as a sole trader)			
15.	Deferred non-commercial business losses			
16.	Net farm management deposits or repayments			
17.	Capital gains			
18.	Foreign entities:			
	– Direct or indirect interests in a controlled foreign company			
	– Transfer of property or services to a non-resident trust			
19.	Foreign source income (including foreign pensions) and foreign assets or property			
20.	Rent (provide documentation) – <b>please refer to our website for a separate checklist.</b>			
	- Do you have one or more rental properties?			
	- Did you buy or sell any property during the income year?			
21.	Bonuses from life insurance companies or friendly societies			
22.	Forestry managed investment scheme income			
23.	Other income (please specify below)			



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DEDUCTIONS	Yes	No	Unsure
<b>D1. Work related car expenses – please complete &amp; provide Motor Vehicle Information form on website</b>			
• Cents per kilometer method (up to a maximum of 5,000 kms)			
• Logbook method			
<b>D2. Work related travel expenses</b>			
<b>Employee domestic travel with a reasonable travel allowance</b>			
• If the claim is more than the reasonable travel allowance rate, do you have receipts for your expenses?			
<b>Overseas travel with a reasonable travel allowance</b>			
• Do you have receipts for accommodation expenses?			
• If travel is for 6 or more nights in a row, do you have travel records (e.g. a travel diary)?			
<b>Employee travel without a reasonable travel allowance</b>			
• Did you incur and have receipts for airfares?			
• Did you incur and have receipts for accommodation?			
• Did you incur and have receipts for hire cars (if applicable)?			
• Did you incur and have receipts for airfares?			
• Did you incur and have receipts for meals and incidental expenses?			
• Do you have any other travel expenses?			
Other work-related travel expenses (e.g. a borrowed car, public transport)			
<i>(Please Specify)</i>			
<b>D3. Work-related uniform and other clothing expenses</b>			
• Protective Clothing			
• Occupation Specific Clothing			
• Non-compulsory uniform			
• Compulsory uniform			
• Conventional clothing			
• Laundry expenses			
• Dry cleaning expenses			
• Other claims such as mending/repairs, etc. (please specify)			

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Deductions (Continued)	Yes	No	Unsure
<b>D4. Work related self-education expenses</b>			
<b>Course taken at educational institution:</b>			
• Union fees			
• Course fees			
• Books, stationery			
• Travel			
• Other (Please specify)			
<b>D5. Other Work-related expenses</b>			
• Home Office Expenses			
• Total hours worked from home			
• Computer and software			
• Telephone/mobile phone			
• Tools and equipment			
• Subscriptions and union fees			
• Journals or periodicals			
• Depreciation			
• Sun protection products (i.e., sunscreen and sunglasses)			
• Seminars and courses not at an educational institution			
• Any other work-related deductions (please specify)			
<b>Other Types of Deductions</b>			
D6. Low value pool deduction			
D7. Interest deductions			
D8. Dividend deductions			
D9. Gifts or donations			
D10 Cost of managing tax affairs.			
• Interest charged by the ATO (e.g. including SIC and GIC)			
• Tax Agent/accounting fees			
• Litigation costs			
• Other expenses incurred in managing tax affairs			
D11. Deductible amount of undeducted purchase price of a foreign pension or annuity			

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Deductions (Continued)	Yes	No	Unsure
D12. Personal superannuation contributions			
Full name of fund _____			
Fund ABN: _____	Fund TFN: _____		
<ul style="list-style-type: none"> <li>Have you provided the fund a notice of intention to deduct the contribution?</li> </ul>			
<ul style="list-style-type: none"> <li>Has this notice been acknowledged by the fund? (please provide copy)</li> </ul>			
Other types of deductions (continued)			
D13. Deduction for project pool			
D14. Forestry managed investment scheme deduction			
D15. Other deductions (please specify)			
L1. Tax losses of earlier income years			

Tax offsets/rebates	Yes	No	Unsure
T1. Are you a senior Australian or pensioner?			
T2. Did you receive an Australian superannuation income stream?			
T3. Did you make superannuation contributions on behalf of your spouse?			
T4 Did you live in a remote area of Australia or serve overseas with the Australian Defense Force or the UN armed forces in the income year?			
T6. Did you maintain a dependent who is unable to work due to invalidity or carer obligations in the income year?			
T7. Are you entitled to claim the Landcare and water facility tax offset?			
T8. Are you involved in an early-stage venture capital limited partnership?			
T9. Are you an early-stage investor in an early-stage innovation company?			
T10. Are you entitled to any other non-refundable tax offsets? (Please specify below)			
T11. Are you entitled to any other refundable tax offsets? (Please specify below)			



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Other relevant information	Yes	No	Unsure
A. Are you entitled to the Medicare levy exemption or reduction in the income year? If yes, please specify: _____			
B. Did you and your spouse/dependents have private health insurance in the income year?			
D. Did you become an Australian tax resident at any time during the income year?			
E. Did you cease to be an Australian tax resident at any time during the income year?			
F. Did you make a non-deductible (non-concessional) personal super contribution?			
G. Do you have a HELP liability, Student Financial Supplement Loan debt, Student Start-Up Load debt or Trade Support Loan debt?			
H. Are you a working holiday maker in Australia on a 417 (working holiday) visa or 462 working holiday) visa?			
I. Did a trust or company distribute income to you in respect of which Family Trust Distribution Tax (FTDT) was paid by the trust or company? <i>(Please specify below)</i>			
J. Do you have a loan with a private company at 30 June 20__ or has such a loan been forgiven in the 20__ income year? Has a private company made a payment to you in the 20__ income year (other than a dividend)? <i>(Please specify below)</i>			
K. Did you receive any benefit from an employee share acquisition scheme?			
L. Family Tax Benefit ('FTB'):			
<ul style="list-style-type: none"> <li>Did you have care of a dependent child in the 20__ income year? – Names &amp; Year of Birth required Name: ..... Year of Birth: ..... Name: ..... Year of Birth: ..... Name: ..... Year of Birth: .....</li> </ul>			
<ul style="list-style-type: none"> <li>Did you or your spouse receive FTB through the Department of Human Services in the 20__ income year?</li> </ul>			
<b>Income Tests information</b>			
<ul style="list-style-type: none"> <li>Do you have any reportable fringe benefits amounts in the 20__ income year?</li> </ul>			
<ul style="list-style-type: none"> <li>Do you have any reportable employer superannuation contributions in the 20__ income year?</li> </ul>			
<ul style="list-style-type: none"> <li>Did you receive any tax-free government pensions in the 20__ income year?</li> </ul>			
<ul style="list-style-type: none"> <li>Did you receive any target foreign income in the 20__ income year?</li> </ul>			
<ul style="list-style-type: none"> <li>Did you have a net financial investment loss in the 20__ income year?</li> </ul>			
<ul style="list-style-type: none"> <li>Did you have a net rental property loss in the 20__ income year?</li> </ul>			
<ul style="list-style-type: none"> <li>Did you pay child support in the 20__ income year?</li> </ul>			
<ul style="list-style-type: none"> <li>Number of dependent children?</li> </ul>			



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Other relevant information	Yes	No	Unsure
<b>Spouse / Partner Details (if applicable)</b>			
<ul style="list-style-type: none"> <li>Did you have a spouse for the full year from 1 July to 30 June.. ? If you had a spouse for only part of the income year, please specify the dates between 1 July to 30 June when you had a spouse? From ____/____/____ to ____/____/____</li> </ul>			
<ul style="list-style-type: none"> <li>What was your spouse’s taxable income for the 20__ income year?</li> </ul>	\$ .....		
<ul style="list-style-type: none"> <li>Does your spouse have a share of trust income on which the trustee is assessed under? Section 98 that has not been included in your spouse’s taxable income?</li> </ul>			
<ul style="list-style-type: none"> <li>Did a trust or company distribute income to your spouse in respect of which family trust distribution tax was paid by the trust or company for the 20__ income year?</li> </ul>			
<ul style="list-style-type: none"> <li>Did your spouse have any reportable fringe benefits amounts for the 20__ income year?</li> </ul>			
<ul style="list-style-type: none"> <li>Did your spouse receive any Australian Government pensions or allowances (not including exempt pension income) in the 20__ income year?</li> </ul>			
<ul style="list-style-type: none"> <li>Did your spouse receive any exempt pension income in the 20__ income year?</li> </ul>			
<ul style="list-style-type: none"> <li>Did your spouse receive any tax-free government pensions paid under the <i>Military Rehabilitation and Compensation Act 2004</i>?</li> </ul>			
<ul style="list-style-type: none"> <li>Does your spouse have any reportable employer superannuation contributions or deductible personal superannuation contributions for the 20__ income year?</li> </ul>			
<ul style="list-style-type: none"> <li>Did your spouse receive any ‘target foreign income’ in the 20__ income year?</li> </ul>			
<ul style="list-style-type: none"> <li>Did your spouse have a total net investment loss (i.e., the total of any financial investment loss and a rental property loss) for the 20__ income year?</li> </ul>			
<ul style="list-style-type: none"> <li>Did your spouse pay child support during the 20__ income year?</li> </ul>			
<ul style="list-style-type: none"> <li>If your spouse is aged between their preservation age and 59 years old, did they receive a superannuation lump sum (other than a death benefit) during the 2019 income year that included a taxed element that does not exceed their low-rate cap?</li> </ul>			
Additional notes/concerns:			
<b>Dated:</b>	____/____/____		
<b>Name of taxpayer:</b>	.....		
	.....		