



TAX RETURN

EOFY INFORMATION

2019 INDIVIDUAL TAX RETURN

1. Please **complete / confirm** your details below to the best of your knowledge
2. All information supplied should be for the **period 1 July 2018 to 30 June 2019**, unless stated otherwise
3. **Provide all supporting documents** where prompted and applicable.
4. **Sign** where indicated and submit to our office.
5. Once submitted we will review and book your end of financial year appointment with us

GENERAL TAX INFORMATION

NAME	D.O.B.	TFN
SPOUSE	D.O.B.	TFN
EMAIL		
WORK #	HOME #	MOBILE #
ADDRESS		
POSTAL		

HOW WOULD YOU LIKE YOUR FINANCIAL ACCOUNTS SUPPLIED?

- Soft copy emailed
- Hard copy bound

Bank Details (If you are expecting a refund, you MUST provide the ATO your EFT Bank Details)

BANK NAME	BSB #	ACCOUNT #	ACCOUNT NAME

Children

NAME	D.O.B.

PAYG Payment Summaries (please attach all documents to the back of the form)

EMPLOYER	OCCUPATION	GROSS	TAX
		\$	\$
		\$	\$
		\$	\$
		\$	\$
		\$	\$

Bank Interest

BANK	AMOUNT	TFN CREDITS	BANK CHARGES
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$

Work & Other Expenses (please attach your detailed listing to the back of the form)

EXPENSE TYPE	AMOUNT	EXPENSE TYPE	AMOUNT
Taxi Fares	\$	Reference Books	\$
Other Travel	\$	Stationery	\$
Uniform / Laundry	\$	Mobile Phone	\$
Sun Protection Items	\$	Internet	\$
Self-Education	\$	Memberships	\$
Union Fees	\$	Tools & Equipment	\$
Seminars / Prof Development	\$	Interest Expenses	\$
Gifts & Donations	\$	Income Protection Insurance	\$
Other Expenses	\$	<i>(please include in detailed listing)</i>	

VEHICLE MAKE	MODEL	WORK KM'S
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MOTOR VEHICLE INFORMATION

Vehicle & Log Book

LOGBOOK KEPT <input type="checkbox"/> Y <input type="checkbox"/> N	PERIOD COVERED BY LOGBOOK <small>(within last 5 financial years)</small>	
VEHICLE PLATE NO.	MAKE & MODEL	
OWNER OF VEHICLE	DRIVE OF VEHICLE	
TOTAL KMs TRAVELLED IN YEAR	BUSINESS KMs IN LOGBOOK PERIOD	
DATE PURCHASED	PURCHASE PRICE	\$
HOW WAS VEHICLE FINANCED? <input type="checkbox"/> Lease <input type="checkbox"/> Paid Cash <input type="checkbox"/> Chattel Mortgage <input type="checkbox"/> Hire Purchase		
DATE SOLD <small>(if in this tax year)</small>	SALE PRICE	\$

Running Costs

COST TYPE	ANNUAL AMOUNT (inc. GST)	MONTHLY PAYMENTS
Fuel / Oil	\$	
Registration	\$	<i>Please provide a copy of your Hire Purchase / Lease / Chattel Mortgage Agreement when you reach the end of the form.</i>
Insurance	\$	
Repairs & Maintenance	\$	
Lease Payments	\$	
Hire Purchase / Chattel Mortgage Payments	\$	\$
Interest Paid	\$	\$
Services	\$	\$
Tyres / Battery	\$	\$
Membership Fees	\$	\$
Parking & Tolls	\$	\$

Private Health Insurance

Do you have private health insurance?	<input type="checkbox"/> Y <input type="checkbox"/> N	YES - please provide your Private Health Statement
Did you have any Out of Pocket Medical Expenses for eligible expenses for disability aids, attendant or aged care?	<input type="checkbox"/> Y <input type="checkbox"/> N	YES - please provide details of your eligible medical expenses minus refunds your or somebody else received from: <ul style="list-style-type: none"> National Disability Scheme (NDIS) Private health insurers
Do you have any of these items? Investment Income, Rental Properties, Investments Sold or Motor Vehicles used for Work	<input type="checkbox"/> Y <input type="checkbox"/> N	YES - please complete relevant sections below NO - please proceed to the end of the form, provide supporting documents, sign and send back to us.

INVESTMENT INFORMATION

Dividends

COMPANY	DATE PAID	UNFRANKED	FRANKED	IMP. CREDITS	TFN CREDITS
		\$	\$	\$	\$
		\$	\$	\$	\$
		\$	\$	\$	\$
		\$	\$	\$	\$
		\$	\$	\$	\$

Unit Trusts

TRUST	TRUST INCOME	TFN CREDITS	IMP. CREDITS	CAPITAL GAINS	FOREIGN INCOME	FOREIGN TAX
	\$	\$	\$	\$	\$	\$
	\$	\$	\$	\$	\$	\$
	\$	\$	\$	\$	\$	\$
	\$	\$	\$	\$	\$	\$
	\$	\$	\$	\$	\$	\$

Investments Sold / Disposed

COMPANY / TRUST	DATE SOLD	NO. SOLD	AMOUNT RECEIVED	DATE PURCHASED	NO. PURCHASED	AMOUNT PAID
			\$			\$
			\$			\$
			\$			\$
			\$			\$
			\$			\$

RENTAL PROPERTY INFORMATION *Please complete one of these schedules per Property.*

Property Details

ADDRESS OF RENTAL PROPERTY

DATE PURCHASED

DATE RENTAL INCOME FIRST EARNT

NO. WEEKS AVAILABLE FOR RENT *(this year)*

DATE BUILT

OWNERSHIP DETAILS

In your name In joint names *(please provide details)*

Please provide the purchase settlement statement and other purchase costs, e.g. stamp duty, legal fees, renovations or initial repairs, and any loan application fees and/or mortgage discharge expenses when you reach the end of the form.

Income

GROSS RENT	OTHER RENTAL INCOME
\$	\$

Expenses

EXPENSE TYPE	AMOUNT	EXPENSE TYPE	AMOUNT
Advertising for Tenants	\$	Body Corporate Fees	\$
Borrowing Expenses	\$	Cleaning	\$
Council Rates	\$	Gardening / Lawn Mowing	\$
Insurance	\$	Interest on Loan(s)	\$
Land Tax	\$	Legal Fees	\$
Pest Control	\$	Property Management Fees	\$
Repairs & Maintenance	\$	Property Man. Commissions	\$
Travel*	\$	Stationery, Phone & Postage	\$
Water Charges	\$	Other Expenses	\$

**Please note that from 1 July 2018 travel expenses for rent collection, inspections, repairs and maintenance are no longer allowed by the ATO as result of the 2018 Budget.*

Depreciable Items

ITEM	DATE PURCHASED	COST
		\$
		\$
		\$

ITEM	DATE PURCHASED	COST
		\$
		\$
		\$
		\$
		\$
		\$
		\$
		\$

Improvements / Construction Costs *Please provide a copy of your tax depreciation schedule prepared by third party below.*

ITEM	DATE	COST
		\$
		\$
		\$
		\$
		\$
		\$
		\$
		\$
		\$
		\$
		\$

OTHER INFORMATION *Please list any other information that you believe may assist us*

SUPPORTING DOCUMENT CHECKLIST

- Payment Summaries
- Detailed Work Expenses Listing
- Private Health Statement
- Out of Pocket for eligible Medical Expense Claims
- Unit Trust Tax Year Summary
- Motor Vehicle Hire Purchase / Lease / Chattel Mortgage Agreement
- Rental Property Purchase Settlement Statement / Costs
- Rental Property Depreciation Schedule (as prepared by Third Party)
- Letter noting tax deductibility of Income Protection Premiums
- Confirmation letter from your superannuation fund noting intent to claim tax deduction for contributions