

# TAX RETURN

## EOFY INFORMATION

### 2022 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 2021 to 30 June 2022**, 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

<b>NAME</b>	<b>D.O.B.</b>	<b>TFN</b>
<b>SPOUSE</b>	<b>D.O.B.</b>	<b>TFN</b>
<b>EMAIL</b>		
<b>WORK #</b>	<b>HOME #</b>	<b>MOBILE #</b>
<b>ADDRESS</b>		
<b>POSTAL</b>		

#### 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)

<b>BANK NAME</b>	<b>BSB #</b>	<b>ACCOUNT #</b>	<b>ACCOUNT NAME</b>
------------------	--------------	------------------	---------------------

### Children

<b>NAME</b>	<b>D.O.B.</b>
-------------	---------------

---



---



---

**PAYG Payment Summaries / Income Statement** (if provided with one 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	\$
Working from Home Expenses	\$	<i>(please note diary/logbook should be maintained)</i>	
Other Expenses	\$	<i>(please include in detailed listing)</i>	

**MOTOR VEHICLE INFORMATION**

VEHICLE MAKE	MODEL	WORK KM'S
<b>Vehicle &amp; Log Book</b>		
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	DRIVER 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?  Y  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?  Y  N **YES** - please provide details of your eligible medical expenses minus refunds your or somebody else received from:

- National Disability Scheme (NDIS)
- Private health insurers

### INVESTMENT INFORMATION

Do you have any of these items? Investment Income, Rental Properties, Investments Sold or Motor Vehicles used for Work  Y  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.

### 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 Purchased/ Sold (including Cryptocurrency)

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	\$
Water Charges	\$	Stationery, Phone & Postage	\$
Other Expenses	\$	<i>(please include in detailed listing)</i>	

**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/Income Statement (if provided with one)
- Detailed Work Expenses Listing
- Private Health Statement (may only be provided if you request one from your registered health insurer)
- Unit Trust Tax Year Summary and/or Dividends received during year
- 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