

2014 TAX RETURN PREPARATION QUESTIONNAIRE

Full Name:			
Date of Birth:		Tax File Number:	
Current Address:			
Email Address:			
Occupation:			
Spouse's Name:		Spouse's DOB:	
Have you changed your name since your last return (Yes / No)?			
If Yes, what was your previous Surname?			
Mobile Number:		Skype Address:	

DEPENDANT CHILDREN

Dependant Child's Name and Date of Birth	Primary or Secondary School

INTEREST INCOME (Financial Institutions such as Banks and Credit Unions)

Financial Institution	\$

SELF EDUCATION EXPENSES (Course taken at educational institution and connected to your current fulltime job)

Course Name	
Course Fees	
Stationery	
Travel (use of private vehicle, taxi, public transport) Kms	
Reference Books	
Equipment such as computers and associated hardware.	

DIVIDEND INCOME (If unsure, enclose Statement from Company)

Name of Public Company	Unfranked Amount	Franked Amount	Imputation Credit

MOTOR VEHICLE: *Cents per kilometre method. (For work related travel such as training, courses or integral component of your employment. Cannot claim motor vehicle expenses for a salary sacrificed car)*

Registration No.	Make	Model	Engine Size	Kilometres for Employment	Log Book (Yes or No)?

DEPRECIABLE EQUIPMENT (Computer, Office furniture, printers, library, GPS, camera etc over \$300 in value)

Description	Date of Purchase	Purchase Price	Private Use Portion (%)

OTHER WORK RELATED DEDUCTIONS:

	\$		\$
Laundrying of Uniform/Corporate Ware/UC <i>Max \$150</i>		Undercover Incidental Expenses (Police)	
Dry Cleaning of Uniform/Wardrobe		ID Wallet	
Purchase of Protective Clothing		Reference Books	
Purchase of Protective Footwear		Teaching Aids (<i>Teachers only</i>)	
Uniform Sewing and Medal Expenses		Parking and Toll Expense for Work Only	
Purchase of Corporate Wardrobe		Carry bag and tactical bag	
Purchase of Undercover Clothing (<i>Police</i>)		Fitness & Gym Expenses (<i>Specialist Police</i>)	
Purchase of Uniform		Portable Radio Holder (<i>Police</i>)	
Use of Private Mobile Phone for Employment		Leatherman Tool	
Work Related Internet Expenses		Subscriptions and Memberships.	
Journals and Periodicals		Excursion Expenses (<i>Teachers</i>)	
Home Office Expenses (<i>Teachers or Educators</i>)		Stationery	
Union Fees/Subscriptions		Professional seminars, courses, conferences and workshops	
Sunglasses, sunhats and sunscreens		Torch and Batteries	
Computer Stationery for Employment Only		IPAD and tablet. (less than \$300)	
Use of Private Land Telephone (on call)		Tax Fee Prior Year (<i>new client only</i>)	

RENTAL PROPERTY If you have an annual financial report from your real estate, please enclose.

Address of Property							
Ownership %		Last Name			First Name/s		
Date of Purchase		Date of 1 st Rental		No of Weeks Rented		weeks	
Gross Rental Income \$							Expenses \$\$\$
Loan Interest On Borrowed Monies							
Land Rates							
Water Rates							
Commission to Real Estate							
Strata Fees (Body Corporate Expense)							
Borrowing Expenses							
Pest Control.							
Leasing/Letting Fees/Advertising/Postage							
Travel Expenses (Kilometres or \$ airfare please)							
Accommodation Expenses (if long distance)							
Gardening/Lawn Mowing							
Landlord Insurance							
Land Tax							
Repairs & Maintenance							
Bank Charges							
Depreciation Inspection Report							

PRIVATE HEALTH INSURANCE

Did you have private medical cover the entire financial year (Yes / No)? <i>If you have received a fund statement, please forward to me.</i>	Name of Fund <input type="text"/>	Membership No <input type="text"/>
***If you have no private health insurance and your income is over 88K (176K for family) you may be charged an extra 1% to 1.5% extra Medicare levy. <i>Your extra surcharge is now income tested.</i>	If you have a spouse and I DO NOT prepare our spouse's tax, I require your spouse's income for 2014. \$ <input type="text"/>	<p style="text-align: center;">IMPORTANT</p> What was your spouse's income or are you a sole parent? (SEE LEFT)
Out of Pocket Medical Expenses <i>(After Medicare and Private Health reimbursements and you can only claim up and above \$2120). The ATO is phasing out this offset and you can only claim with 20% rebate if you have claimed out of pocket medical expenses in your 2013 Tax. It is also income tested.</i>	\$ <input type="text"/> Please deduct what Medicare and/or health fund reimburse you.	

Donations (Charitable Organizations)	\$

Direct Crediting of your tax refund.

If you would like your tax refund direct credited to your nominated account please provide me the following

Account Name

BSB and Account Number.

DECLARATION

My engagement is to prepare and lodge your annual income tax return. Before I lodge any tax return on your behalf, I will forward a copy to you for approval and signing. I will endeavor to ensure that the return is lodged by the due date. If you are late in providing information, I will do my best to meet the time limits, but I will not be responsible for any lodgments penalties that you may incur.

The tax return which I specially engaged to prepare, together with any original documents given to me by you, shall be your property. Any other documents brought into existence by me, including this questionnaire and general working papers will remain my property at all times.

Our agreed fee is only for the preparation and lodgment of your taxation return. Any additional services that you requested are not included in this agreed fee.

It is expected that, in respect of your taxation return, that you will comply with the substantiation provisions of the Income Tax Assessment Act. My fee for the preparation and lodgment of your taxation return does not cover any inquiries or investigations conducted by the Australian Taxation Office.

ACKNOWLEDGMENT OF TERMS OF ENGAGEMENT

I confirm I understand and agree to your terms of engagement. Dated the day of 20

Digital Signature

Button to Email