

# BRIAN N SULLIVAN

## Registered Tax Agent

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Thank you for your taxation business.

This is your tax preparation questionnaire that you can utilize to have your tax return completed and lodged by me. It caters for people with busy lifestyles or just too far from my office to have a person to person interview. With modern technology today like emails, texting and FaceTime communication is not a problem.

All you need to do is complete your questionnaire, attach your payment summary(s), health fund statement (if applicable) and return the documentation to me preferably by email attachment to (bnstax@optusnet.com.au). Your taxation return will be completed by me and forwarded electronically to you for inspection, signing and approval. My taxation service is fully paperless now so you will receive your taxation return electronically. This will speed up your time to get your tax refund.

Fees are higher for individual tax returns that have rental investments, capital gains, vehicular and business schedules.

Look forward to hearing from you.

**Brian Sullivan**  
*Registered Tax Agent*



Tax agent  
63558015

# TAX RETURN PREPARATION QUESTIONNAIRE

Full Name:			
Date of Birth:		Tax File Number (TFN)	
Current Address:			
Email Address:			
Occupation:			
Spouse's Name:		Spouse's DOB:	
Have you changed your name since your last return?	YES or NO		
If Yes, what was your previous Surname?			
Mobile Number:		Can I TEXT you?	YES or NO

## 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 (%)

<b>OTHER WORK RELATED DEDUCTIONS:</b>	<b>\$</b>	<b>\$</b>
Laundering of Uniform (Maximum \$150)		Undercover Incidental Expenses (Police only)
Laundering of Undercover Clothing (Police Only)		Medal Expenses.(Uniform)
Dry Cleaning of Uniform/Wardrobe		ID Wallet
Purchase of Protective Clothing		Reference Books
Purchase of Protective Footwear		Teaching Aids (Teachers and Educators only)
Uniform Maintenance. (Boot Polish and Grooming)		Parking and Toll Expense for Work Only
Purchase of Corporate Wardrobe		Carry bag and tactical bag
Purchase of Undercover Clothing (Police)		Fitness & Gym Expenses (Specialist 000)
Purchase of Corporate Logo Uniforms		Portable Radio Holder (Emergency Services)
Laundering of Corporate Clothing (LOGO)		Leatherman Tool (Emergency Services)
Work Related Internet Expenses		Subscriptions and Memberships.
Journals and Periodicals		Excursion Expenses (Teachers)
Home Office Expenses (Teachers or Educators)		Stationery
Union Fees		Professional Development Expenses
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 only)		Tax Fee Prior Year (new client only)
Fitness Expenses (Specialist Military)		Other Work Related Deduction
Use of Private Mobile Phone for Employment		Police Informant Expenses
Computer Repairs (work only %)		

**RENTAL PROPERTY** If you have an annual financial report from your real estate, please send to me electronically.

Address of Property			
Ownership %	Last Name	First Name/s	
Date of Purchase	Date of 1st 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 Fees			
Gardening/Lawn Mowing			
Landlord Insurance			
Land Tax			
Repairs & Maintenance			
Bank Charges			
Depreciation Inspection Report			
Postage			
Advertising Costs with Real Estate			
Letting Fees			
Gas Expenses (bottles)			
Airmiles and Incidentals			
Tip Fees			
Mobile Phone Calls			

## PRIVATE HEALTH INSURANCE

Did you have private medical cover the entire financial year (Yes / No)? <input type="text"/>	Name of Fund <input type="text"/>	Membership No. <input type="text"/>
If you have received a fund statement, please forward to me electronically.		
Are you a sole parent? YES or NO	If you have a spouse and I DO NOT prepare their tax, I require your spouse's income for the financial year. (Not required if I am doing your spouse's tax) \$	How many dependent children to you have? (Please give number in this box)

Donations to Charitable Organizations	\$

## Direct Crediting of your tax refund.

Your tax refund will be 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

\_\_\_\_\_ confirm that I understand and agree to your terms of engagement.

Dated the \_\_\_\_\_ day of \_\_\_\_\_ 20\_\_\_\_\_.

Sign please.