

## Personal Tax Return Questionnaire - 2011

*I/We hereby instruct you to prepare our Taxation Returns for the financial year ended 30 June 2011.*

*I/We undertake to supply all information necessary to carry out such services, and will be responsible for the accuracy and completeness of such information.*

*You are hereby authorised to communicate with my bankers, solicitors, finance companies and all government agencies such as the ATO to obtain such information as you require to enable you to carry out the above assignment.*

Name: \_\_\_\_\_ Signature: \_\_\_\_\_  
Date: \_\_\_\_\_

**To ensure that our records are up to date, please assist us by confirming and/or completing the following:**

Full Name: \_\_\_\_\_  
Home address: \_\_\_\_\_  
Telephone: Home: \_\_\_\_\_ Business: \_\_\_\_\_  
Fax: \_\_\_\_\_ Mobile: \_\_\_\_\_  
Email address: \_\_\_\_\_  
Your occupation: \_\_\_\_\_  
Date of birth: \_\_\_\_\_  
Spouse's name: \_\_\_\_\_  
Spouse's date of birth: \_\_\_\_\_  
Period you had a spouse during \_\_\_\_\_ to \_\_\_\_\_  
year: \_\_\_\_\_  
Number of dependants \_\_\_\_\_  
Do you wish to use electronic funds  Yes  No

\*If yes, we will then require the following information

Bank name: \_\_\_\_\_  
Account name: \_\_\_\_\_  
BSB number: \_\_\_\_\_ Account number: \_\_\_\_\_

Tax refunds can be made via electronic funds transfer. It should be noted that this electronic funds transfer authority can be cancelled for future years.

### Financial Health Check Questions

✓ if Yes

Have you reviewed your loans during the last 12 months?

Have you reviewed all your insurance premiums during the last 12 months?

Have you consulted a financial planner during the last 12 months?

Do you have a will?

<b>1. If we are preparing your tax return for the first time:</b>		<b>✓ if Yes</b>	<b>Amounts \$ / Comments</b>
1.1	Please provide a copy of your last tax return, taxation assessment and PAYG instalment notices.	<input type="checkbox"/>	
1.2	Copies of any other correspondence from the Tax Office such as objections, penalties and statement of account.	<input type="checkbox"/>	
<b>2. Income</b>		<b>✓ if Yes</b>	<b>Amounts \$ / Comments</b>
Have you received any of the following payments?			
2.1	PAYG Payment Summaries from employment	<input type="checkbox"/>	
2.2	Any allowances, benefits and other earnings not on your PAYG Payment Summary	<input type="checkbox"/>	
2.3	Lump sum payments e.g. Pro Rata Annual Leave	<input type="checkbox"/>	
2.4	Employment Termination Payments Payment Summary	<input type="checkbox"/>	
2.5	Australian Government pensions, allowances and payments e.g. Youth Allowance, Austudy, Newstart	<input type="checkbox"/>	
2.6	An Australian Annuity or Superannuation Pension	<input type="checkbox"/>	
2.7	Reportable fringe benefits	<input type="checkbox"/>	
2.8	Interest from any source within Australia	<input type="checkbox"/>	
2.9	Dividends from companies in Australia (including any reinvested)	<input type="checkbox"/>	
2.10	Shares or options from your employer	<input type="checkbox"/>	
2.11	Distributions from a partnership or trust (including from a managed fund)	<input type="checkbox"/>	
2.12	Income from running a business	<input type="checkbox"/>	
2.13	Income from a foreign pension or annuity	<input type="checkbox"/>	
2.14	Interest, royalties, dividends, rent or any other income from foreign sources	<input type="checkbox"/>	
2.15	Money from the sale of foreign assets (such as property or shares)	<input type="checkbox"/>	
2.16	Have you sold or disposed of any assets?	<input type="checkbox"/>	
2.17	Have you received rental income or made your property available for rent?	<input type="checkbox"/>	
2.18	Have you received any other income?	<input type="checkbox"/>	
<b>3. Adjustments</b>		<b>✓ if Yes</b>	<b>Amounts \$ / Comments</b>
3.1	Have you become or ceased to be a resident of Australia during this financial year?	<input type="checkbox"/>	
3.2	Were you under the age of 18 years on 30 June 2011?	<input type="checkbox"/>	

4.	Deductions	✓ if Yes	Amounts \$ / Comments
4.1	Have you incurred any of the following work related expenses?	<input type="checkbox"/>	
4.2	Expenses in relation to your employment that were covered in part (or in full) by a corresponding allowance	<input type="checkbox"/>	
4.3	Motor vehicle expenses	<input type="checkbox"/>	
4.4	Travel in relation to your employment	<input type="checkbox"/>	
4.5	Occupation specific clothing, protective clothing or compulsory uniform	<input type="checkbox"/>	
4.6	Laundry expenses (Washed by itself or with other items?)	<input type="checkbox"/>	
4.7	Self education <i>For the year ended 30 June 2011 you can claim a deduction for study expenses if receiving youth allowance, austudy and abstudy.</i>	<input type="checkbox"/>	
4.8	Sun protection products	<input type="checkbox"/>	
4.9	Meals when working overtime	<input type="checkbox"/>	
4.10	Union fees	<input type="checkbox"/>	
4.11	Subscriptions to professional bodies	<input type="checkbox"/>	
4.12	Work related equipment – purchase, repair or insurance thereof	<input type="checkbox"/>	
4.13	Books, journals and professional libraries	<input type="checkbox"/>	
4.14	Home office expenses for income producing activities (How many hours have been worked from home?)	<input type="checkbox"/>	
4.15	Telephone/internet expenses for work	<input type="checkbox"/>	
4.16	Computer and/or software for work related purposes	<input type="checkbox"/>	
4.17	Seminars, conferences and other training	<input type="checkbox"/>	
4.18	Expenses relating to any dividend or interest income	<input type="checkbox"/>	
4.19	Gifts or donations (>\$2) <i>For the year ended 30 June 2011, you can claim up to \$10 for "bucket donations" for natural disasters without receipts.</i>	<input type="checkbox"/>	
4.20	Preparation and lodgement of previous year's tax return or advice from a registered tax agent (including travel)	<input type="checkbox"/>	
4.21	Super contributions to a complying superannuation fund? <i>Do you wish to claim a deduction for this OR receive a government co-contribution? Please note that as of 1 July 2009, there are new income tests which will determine your eligibility for the co-contribution.</i>	<input type="checkbox"/>	
4.22	Sickness and Accident or Income Protection Insurance premiums	<input type="checkbox"/>	
4.23	Where you receiving Newstart or Youth Allowance and actively seeking paid work? <i>If yes, please provide details of any expenses incurred –e.g. resume cost, phone calls.</i>	<input type="checkbox"/>	
4.24	Have you incurred any other deductions in the course of earning assessable income? <i>If yes please provide detail</i>	<input type="checkbox"/>	

5.	Tax Offsets	✓ if Yes	Amounts \$ / Comments
5.1	Do you have a spouse (married or de facto)?	<input type="checkbox"/>	
5.1.1	Were either you or your spouse eligible/receive FTB Part B?	<input type="checkbox"/>	
5.1.2	Please provide details of your spouse's taxable income if we do not prepare his/her tax return	<input type="checkbox"/>	
5.2	Have you had a full time housekeeper OR has your child, adopted child or stepchild kept house for you on a full-time basis?	<input type="checkbox"/>	
5.3	Were you a member of a private health fund? <i>If yes, please provide statement.</i>	<input type="checkbox"/>	
5.4	Are you exempt from paying the Medicare Levy?	<input type="checkbox"/>	
5.5	Have you contributed any superannuation on behalf of your spouse?	<input type="checkbox"/>	
5.6	Have you lived in a remote or isolated area of Australia? (Where? How many days?)	<input type="checkbox"/>	
5.7	Have you paid medical expenses in excess of \$2,000 (after Medicare and private health insurance refunds)? If yes, please provide your Medicare number and details of expenses.	<input type="checkbox"/>	
5.8	Do you have a HECS/HELP debt?	<input type="checkbox"/>	
5.9	Did you care for a child or children registered or enrolled in a primary or secondary school course provided at an educational institution such as a school or TAFE (secondary school study only) or a registered home school education authority?	<input type="checkbox"/>	
5.9.1	If yes, did the child or children attend the course of study or instruction, or receive home schooling for at least one day in the six-month period, commencing from 1 July 2010 to 31 December 2010 and / or 1 January 2011 – 30 June 2011.	<input type="checkbox"/>	
5.9.2	Did you receive Family Tax Benefit (FTB) Part A?	<input type="checkbox"/>	
5.10	In relation to your children's education costs, did you incur any of the following expenses?		
5.10.1	Laptop computer or home computer purchase / repairs	<input type="checkbox"/>	
5.10.2	Computer-related equipment such as printers, USB flash drives, as well as disability aids to assist in the use of computer equipment for students with special needs	<input type="checkbox"/>	
5.10.3	Home internet connections	<input type="checkbox"/>	
5.10.4	Computer software for educational use	<input type="checkbox"/>	
5.10.5	School textbooks and other printed learning material, including prescribed textbooks, associated learning materials, study guides and stationery	<input type="checkbox"/>	
5.10.6	Prescribed trade tools for secondary school trade courses	<input type="checkbox"/>	
<b>6.</b>	<b>Any other issues to be discussed: (please indicate below)</b>		