

Personal Tax Return Questionnaire

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PERSONAL DETAILS

Client Name		DOB	/ /
Address		Occupation	
		Tax File No	
Telephone	()	Current Bank	
Mobile		Account No	
Email Address		BSB No	

We will need details of your Income. Please provide us with copies of:

<input type="checkbox"/>	Salary or Wages eg PAYG summary	<input type="checkbox"/>	Dividends – shares (including dividend reinvestment) Trust Distributions and Managed Fund Dists
<input type="checkbox"/>	Lump Sum payments	<input type="checkbox"/>	Other income
<input type="checkbox"/>	Eligible termination payments	<input type="checkbox"/>	Rent – expenses incurred and rents received for rental properties
<input type="checkbox"/>	Commonwealth of Australia Government payments eg NewStart, pensions, youth allowances and Austudy	<input type="checkbox"/>	Disposal of Assets eg capital gains – real estate/shares (refer below)
<input type="checkbox"/>	Interest – investment, bank accounts		

Disposal of Assets (Capital Gains)

	Asset 1	Asset 2
Date and cost of purchase	/ / \$	/ / \$
Date sold and consideration received	/ / \$	/ / \$
Commission, legal fees and other cost base items	\$	\$

Deductions

Please total deductions for which you have receipts and/or signed descriptions for.

All receipts must be kept for a period of five years.

Work Related	Amount
Car expenses	\$
Uniform	\$
Self education	\$
Travel expenses	\$
Income Protection Insurance	\$
Other Expenses	
Union fees	\$
Seminars	\$
Overtime meals	\$
Briefcase	\$
Tools and equipment	\$
Depreciation	\$
Calculator/electronic organizer	\$
Computer costs (where business usage diarised)	\$
Memberships	\$
Subscriptions	\$
Telephone	\$
Mobile	\$
Gifts/donations	\$
Interest	\$
Dividend Deductions: Franked	\$
Dividend Deductions: Unfranked	\$
Cost of last year's tax return	\$

Please Note: No Receipts – No Claim
The Tax Department is Cracking Down on This

Work Related Car Expenses				
Vehicle Details				
Rego		Make		Model No
Expenses				Amount
Fuel				\$
Insurance				\$
Repairs				\$
Interest				\$
Services				\$
Registration/Third party				\$
Lease payments				\$
Tyres/battery				\$

Other Issues to Consider						
	Yes	No	Notes/Comments			
Family Tax Benefit	<input type="checkbox"/>	<input type="checkbox"/>				
HECS	<input type="checkbox"/>	<input type="checkbox"/>				
Rebates and tax offsets	<input type="checkbox"/>	<input type="checkbox"/>				
PAYG instalment credits	<input type="checkbox"/>	<input type="checkbox"/>				
Baby bonus	<input type="checkbox"/>	<input type="checkbox"/>	Name		DOB	/ /
Private Hospital cover (annual statement from provider is required)	<input type="checkbox"/>	<input type="checkbox"/>	Fund Name/ID		Member	
Medicare No						
Dependents						

Checklist for Rental Property			
Address	Gross rental income		\$
	Weeks rented		
	Date property first earned income		/ /

Agents yearly summary if applicable – if no managing g agent then	
Expenses	Amount
Advertising for tenants	\$
Body Corporate fees	\$
Borrowing	\$
Cleaning	\$
Council rates	\$
Capital allowances	\$
Gardening and lawn mowing	\$
Insurance	\$
Interest of loans	\$
Land tax	\$
Legal fees	\$
Pest control	\$
Property agent fees and commission	\$
Repairs and maintenance	\$
Capital works deductions	\$
Stationery, telephone and postage	\$

Travel	\$
Water charges	\$
Sundry related	\$

Anything Else?
Superannuation – Details of Non Concessional contributions for purposes of Co Contribution payment – if applicable
Donations – over \$2, including to school building funds – you must have a receipt which states the donation is tax deductible
Were Net Medical expenses over \$2000 for purpose of Medical expense tax offset
Education Tax offset – if receiving FTBA – receipts in relation to your children education – for FY 2012 includes uniforms (this is the last year it this offset is available)