**For The Year Ended 30 June FYear**

## I. Personal Information/Identification

For the purposes of preparing the tax return, please provide the following **(*Please attach appendices with references, as required):***

***If you are an existing client from last year, please only update if your information has changed.***

|  |  |  |  |
| --- | --- | --- | --- |
| Name | First Name | Last Name | |
| Date of Birth | Date of Birth | | |
| Postal Address (Australia) | Click here to enter text. | | |
| Phone/mobile no. | Click here to enter text. | | |
| Email Addresses | 1. email address 1 | | 2. email address 2 |
| Job Role/Title | Click here to enter text. | | |
| Residency | Permanent  Others; please specify (visa type): Click here to enter text.  **Country of Origin**: Click here to enter text.If on a working visa) | | |
| Identification (ID) copy  *(for new client only)* | Type of Identification document attached: | | |
|  | Passport  Driver's License  Others, please specify enter text here | | |

### II. Bank Details

In the event of a refund from the ATO, could you please provide your bank details, including the following:

|  |  |
| --- | --- |
| Account Name | Click here to enter text. |
| BSB | Click here to enter text. |
| Account Number | Click here to enter text. |

### III. Employment Details

1. Please forward to us the following documents:

* **PAYG Payment Summary** and/or **Income Tax Statement** (for businesses)
* If possible, please provide a copy of your last income tax return lodged.

1. Please advise your employment income for the year: Click here to enter text.

### IV. Employment Deductions

In relation to your employment allowable deductions for the year, please provide the following: **(*Please attach appendices with references, as required)***

|  |  |  |
| --- | --- | --- |
| 1. *Car related expenses:*   *Please advise the number of kilometres travelled for business purposes, and a brief calculation on now you arrived at this number. Please note that the maximum a taxpayer can claim without a logbook is 5,000 kms for extraordinary travel (i.e. not to or from work/home). If greater than 5,000 kms travelled, please contact our office to discuss alternatives for claiming work related car expenses.* | **Car Make/Model:** Click here to enter text.  **Business Kms Travelled:** Click here to enter text.    **Calculation of kms travelled:** Click here to enter text. | |
| 1. *Details of any work related travel expenses, being tolls, parking, taxis etc. which are out-of-pocket and have a nexus with your employment.* | **Description** | **Amount (AUD)** |
| Click here to enter text. | Type here. |
| Click here to enter text. | Type here. |
| 1. *Please advise details of any work-related self-education expenses not reimbursed by your employer, including university / college fees (not HELP funded), courses, conferences and seminars. Please advise the cost of any incidental expenses to self-education, including travel, text manuals and stationery.* | **Description** | **Amount (AUD)** |
| Click here to enter text. | Type here. |
| Click here to enter text. | Type here. |
| Click here to enter text. | Type here. |
| 1. *Do you conduct any work from home? If so advise on average how many hours per week and we will take up a home office expense deduction on this basis.* | Click here to enter text. | |
| 1. *Please advise your total mobile phone costs for the year and an approximate business use percentage based on total number of calls.* | Click here to enter text. | |
| 1. *Please advise your total home internet costs (and ancillary costs, such as line rental) for the year and an approximate business use percentage.* | Click here to enter text. | |
| 1. *Details of any other work related expenses incurred during the year. Typical examples include union fees, seminars, subscriptions, trade publications (e.g. work related magazines), computer software, computer hardware and briefcase.* | **Description** | **Amount AUD)** |
| Click here to enter text. | Type here. |
| Click here to enter text. | Type here. |
| Click here to enter text. | Type here. |
| Click here to enter text. | Type here. |
| Click here to enter text. | Type here. |
| Click here to enter text. | Type here. |
| Click here to enter text. | Type here. |
| 1. *Please advise any deductible gifts or donations made during the year.* | **Description** | **Amount ($AU)** |
| Click here to enter text. | Type here. |
| Click here to enter text. | Type here. |
| 1. *Please provide income protection insurance premium you paid for the year, if applicable.* | Click here to enter text. | |
| 1. *Please advise the amount you paid to your previous accountant for managing your tax affairs in the last financial year as they are tax deductible. (if not done by Cruz & Co.)* | Click here to enter text. | |
| 1. *Please advise details of any investment income earned during the year, including bank interest, dividends, trust distributions or foreign income.* | Click here to enter text. | |
| 1. *Please advise if you held a private health insurance policy during the year.* ***If so please provide a copy of your annual statement****.* | Click here to enter text. | |
| 1. *Please provide your spouse’s taxable income for the financial year (approximate is fine).* | Click here to enter text. | |
| 1. *Did you make any personal superannuation contributions this year? If so, please provide paperwork.* |  | |
| 1. ***Please advise if you had a rental property. If so, provide income and expense details pertaining to the rental property including:*** | | |
| * Address of the property and number of weeks rented during the financial year | Click here to enter text. | |
| * Rental income | Click here to enter text. | |
| * Strata levies | Click here to enter text. | |
| * Interest on loans | Click here to enter text. | |
| * Property agent fees | Click here to enter text. | |
| * Repairs & Maintenance | Click here to enter text. | |
| * Insurance | Click here to enter text. | |
| * Land tax | Click here to enter text. | |
| * Council & Water rates | Click here to enter text. | |
| * Pest control | Click here to enter text. | |
| * Sundry rental expenses | Click here to enter text. | |
| * Capital allowances & Capital works deduction (If you have a depreciation schedule or quantity surveyor report, please provide us with a copy). | Click here to enter text. | |
| ***Please provide a copy of the rental property statement if you used a property agent*** | | |
| 1. ***In relation to your sole trading business for the year, please provide the following:*** | | |
| * Business address (if different to home address); | Click here to enter text. | |
| * Sales revenue received | Click here to enter text. | |
| * Car expenses: please advise number of kilometres travelled for business purposes. Please note that the maximum a taxpayer can claim without a logbook is 5,000 kms for extraordinary travel (i.e. not to or from work/home). If greater than 5,000 kms travelled, please contact our office to discuss alternatives for claiming business related car expenses. | Click here to enter text. | |
| * Costs of any property or equipment required to conduct business | Click here to enter text. | |
| * Home office expenses such as rent, electricity and the floor space percentage dedicated to your sole trader business (please contact our office if you require assistance on this matter) | Click here to enter text. | |
| * Internet, home phone and mobile phone expenses dedicated to your sole trader business | Click here to enter text. | |
| * Salaries or wages paid to staff, including superannuation | Click here to enter text. | |
| * Superannuation paid to yourself | Click here to enter text. | |
| * Please provide details of any deductible personal insurance costs incurred during the year, including income protection insurance | Click here to enter text. | |
| * Details of any other business-related expenses | Click here to enter text. | |
| 1. **If you sold any shares or units during the year, please provide the following information:** | | |
| * Purchase and sale documents; or | Click here to enter text. | |
| * Summary containing he following information: |  | |
| * Purchase date; | Click here to enter text. | |
| * Purchase price; | Click here to enter text. | |
| * Sale date; | Click here to enter text. | |
| * Sale proceeds; and | Click here to enter text. | |
| * Any costs incurred in relation to the purchase and sale | Click here to enter text. | |
| 1. **We understand that you sold your investment property during the year. In order for us to calculate any gains or losses on the sale, could you please provide:** | | |
| * Purchase and sale contracts (front pages only); | Click here to enter text. | |
| * Purchase and sale settlement sheets; | Click here to enter text. | |
| * Purchase and sale legal fees; | Click here to enter text. | |
| * Stamp duty on purchase; | Click here to enter text. | |
| * Agents commission on sale | Click here to enter text. | |