**For The Year Ended 30 June 20\_\_**

## 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 | | |
| Tax File Number | Click here to enter text. | | |
| 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**
* 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.*  *Note that the trip from your home to your main office/workplace is a* ***private*** *trip.*  *Please note that the maximum a taxpayer can claim without a logbook is 5,000 kms. If greater than 5,000 kms travelled, we will contact you to discuss alternatives for claiming work related car expenses.* | Car Make/Model:  Business Kms Travelled:  Calculation of kms travelled: | |
| 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 for the period 1 July 2020 to 30 June 2021.*   *Evidence Required: Logbook for a minimum of 4 weeks, logging the date & times you worked from home.* | 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.*   *Note: Need purchase date for any items >$300.* | **Description** | **Amount AUD)** |
| Click here to enter text. | Type here. |
| Click here to enter text. | Type here. |
| Click here to enter text. | Type here. |
| Click here to enter text. | Type here |
| Click here to enter text. | Type here |
| Click here to enter text. | Type here |
| Click here to enter text. | Type here |
| 1. *Please advise any deductible gifts or donations made during the year. Donations can only be claimed to Deductible Gift Recipients.* | **Description** | **Amount ($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. *Did you buy or sell Cryptocurrency during the year? If so, please provide the tax statements from your Crypto exchange, or spreadsheet showing and gains or losses made during the financial year.* |  | |
| 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. | |