

TAX RETURN - PERSONAL INFORMATION

1. Title you prefer

Mr	Mrs	Ms	Miss
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 (please circle one)

2. Last Name

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3. First Name

--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--

If ATO records show a different name... What is that name?

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4. Current Address

--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--

5. Telephone

--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--

 6. Email

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7. Born

D	D	M	M	Y	Y	Y	Y
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8. Tax File No.

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9. Occupation Your main occupation during the year

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10. Bank Details For your tax refund to be credited. (An account on which your name appears)

BSB

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 Account No.

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11. Spouse/Partner If you live with a spouse or partner as "a couple" you must also advise their information and approximate income.

	Last Name		First Name																																								
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	Born <table border="1" style="display: inline-table;"><tr><td>D</td><td>D</td><td>M</td><td>M</td><td>Y</td><td>Y</td></tr></table>	D	D	M	M	Y	Y	Approx. Gross Income \$	<table border="1" style="display: inline-table;"><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr></table>																																		
D	D	M	M	Y	Y																																						
		Salary Sacrificed \$	<table border="1" style="display: inline-table;"><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr></table>																																								

12. Health Insurance Did you and your spouse/partner hold qualifying private hospital cover the whole year? Y N
if yes, please forward the annual summary provided by your fund.

13. Dependent Children living with you (under 21 and income less than \$1786)
please advise names, birthdates and income of each

If eligible for remote zone offset, will you be the claiming parent? Y N

This year's tax return has again many questions not relevant to most people...in relation to exempt income, family trust income, capital gains, Spouse super contributions, shares in employer companies, child maintenance paid. Please advise if you consider these issues may be relevant to your tax return.

Don't want to visit a Tax Agent?

...you don't have to!

Just complete the flyer, and either mail, email or fax it, and we will have the finished return to you in no time!!!

TAX RETURNS

for EDUCATION and TRAINING workers

Mostly **\$110**
Low Income Returns
(less than \$20,000) **\$75**



Tax agent
24706815



Prepared while you wait, or by mail, email or fax by:



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What Tax Deductions Can be Claimed?

All that you spend to enable you to do your job well, can be claimed, excepting cost that are of a private or domestic nature. Sadly, home rent, travel to work and back, and normal clothing are considered to be of the not claimable.

Answer the Questions on the next 2 pages, fill in your personal details on the last page, and we will complete your tax return in no time.



This is what you must tell us...

How much that you spent **during the year, for which you have receipts**, or could readily obtain receipts if required to do so, on the following:

Clothing (of allowable type)	Compulsory logoed, visibility or other safety type, approved corporate wardrobe or occupation specific	\$ _____	1
Footwear (of allowable type)	Gum boots, steel capped, safety non-slip, nurses shoes.	\$ _____	2
Union	Are you in a union? <input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> O	\$ _____	3
Trade Societies & Registrations		\$ _____	4
On-going Educational Seminars, Courses, First Aid, etc.		\$ _____	5
Teaching Aids	- Items \$300 or less - Items over \$300	\$ _____ We depreciate	6
Stationary, Copying, Books, Magazines, Professional Library		\$ _____	7
* Computer etc.	Work usage _____% ⇒ New equipment bought - Items \$300 or less - Items over \$300 \$ _____ ⇒ Supplies & Repairs	\$ _____ \$ _____	8
* Internet	Years cost \$ _____	Work usage _____% We calculate	9
* Telephone	If used at work we need: Years cost \$ _____ Are you on call? <input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> O	Work usage _____% We calculate	10
Sun Protection	Cost \$ _____	Claim _____% We calculate	11
Income Protection Insurance	Paid by you - not your super fund.	\$ _____	12
Self Education Degree / Diploma Courses	Must relate directly to your "at the time" job	\$ _____	13
Other Work Cost	Excursions, School Trips & Camps	\$ _____	14

* The ATO requires that computer, internet and telephone apportionments be justified with 1 month usage log books.

Items claimable without receipts:

Laundry (of allowable clothing)	Maximum claim \$150 calculated at the rate of \$1 per wash if washed separately to other clothing or 50c if not.	\$ _____	15
Home Office	Claimable at set rate for hours worked from home. Estimated hours for year _____	We calculate	16
Car Travel	On work related business, attending courses, or self education etc. or between jobs or sites. If your daily travel involves working at more than 1 site for the same employer, the whole travel from home, to back home, is claimable. We Need Car make & model _____ Multi-site Job <input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> O No. Kms travelled on work for the year _____ A log book is not necessary, but you should have records to substantiate such as diary listings etc.	We calculate	17
Low Cost Work Expenses	That you can't find receipts for. Items costing \$10 or less that you have diary noted full details of the purchase. Other items \$ _____	\$ _____	18
Other things we need to know:			
Donations	Voluntary donations to allowable charities, school building funds and political parties. Receipts will state if they are tax deductible.	\$ _____	19
Tax Agent Fees	Amount paid to last years Tax Agent for work done in previous year \$ _____. Travel to your tax agent is also claimable, so please advise distance travelled _____ Kms	We calculate	20
Medical Expenses	Aged care & disability aids costs, in excess of \$2,299 will produce a claim. Other types expenses will not,	\$ _____	21
*Other Income	Details of any other income you received for the year. Most bank interest & dividend amounts we can access on the ATO website, but please advise us of the bank & company names to enable confirmation.	Please Attach a list	22

Remember to bring/send a copy of:

1. Your health fund notice (If you have private health insurance)
2. Your wage certificates. We will ascertain any centrelink income you received.
3. Any depreciation schedule in your last years tax return.

Please do not bring or forward your receipts