

Tax Return Information Form

2017 Individual Tax Return

KEYPOINT
Business Consultants.

Please e-mail, fax or post this form back to our office **PRIOR** to your appointment:

TO: Keypoint Business Consultants Pty Ltd FAX: 07 5571 2777
ATTENTION: E-MAIL: info@keypointbc.com.au
PHONE: 07 5585 0600

CLIENT NAME:		CLIENT SIGNATURE:	
INFORMATION FOR 2017 TAX RETURN (1 July 2016 to 30 June 2017)			
Name:		Spouse Name:	
DOB:		Spouse DOB:	
Residential Address:		Postal Address:	
TFN:		Email:	
Phone:	W	H	M
BANK DETAILS, if you are expecting a refund, you MUST provide the ATO your EFT Bank Details)			
Account Name:		Bank Name:	
BSB:		Account No.:	
CHILDREN			
Name:		Name:	
DOB:		DOB:	
Name:		Name:	
DOB:		DOB:	
PAYG PAYMENT SUMMARIES (Please Attach, Fax or Email All Slips)			
Employer:	Occupation:	Gross:	Tax:
		\$	\$
		\$	\$
		\$	\$
BANK INTEREST			
Bank:	Amount:	TFN Credits:	Bank Charges:
	\$		
	\$		
WORK & OTHER EXPENSES (Please Attach, Fax or Email Detailed Listing)			
Motor Vehicle Type:		Reference Books:	\$
Engine Size (litres):		Stationery:	\$
Work Kilometres:		Mobile Phone Log Book:	\$
Taxi Fares:	\$	Internet:	\$
Other Travel:	\$	Memberships:	\$
Uniform/Laundry:	\$	Tools & Equipment:	\$
Sun Protection Items:	\$	Interest expenses:	\$
Self-Education:	\$	Gifts & Donations:	\$
Union Fees:	\$	Income Protection Insurance:	\$
Seminars/Prof Development:	\$	Other Expenses:	Please Attach Details
PRIVATE HEALTH INSURANCE - Must provide Health Fund Statement			
Fund Name:		Type of Cover:	
Membership No:		Days Covered:	Excess:
Rebate Claimed?	<input type="checkbox"/> Yes <input type="checkbox"/> No		
If Yes What %	<input type="checkbox"/> 10% <input type="checkbox"/> 20% <input type="checkbox"/> 30%	<input type="checkbox"/> 31% <input type="checkbox"/> 35% <input type="checkbox"/> 36% <input type="checkbox"/> 40% <input type="checkbox"/> 41%	
DO YOU HAVE ANY OF THESE ITEMS? (If so, then please download additional forms from www.keypointbc.com.au)		<input type="checkbox"/> Investment Income	<input type="checkbox"/> Rental Properties
		<input type="checkbox"/> Investments Sold	<input type="checkbox"/> Motor Vehicles used for Work