



# TAX RETURN

## EOFY INFORMATION

### 2018 INDIVIDUAL TAX RETURN

1. Please **complete / confirm** your details below to the best of your knowledge
2. All information supplied should be for the **period 1 July 2017 to 30 June 2018**, unless stated otherwise
3. **Provide all supporting documents** where prompted and applicable.
4. **Sign** where indicated and submit to our office.
5. Once submitted we will review and book your end of financial year appointment with us

#### GENERAL TAX INFORMATION

<b>NAME</b>	<b>D.O.B.</b>	<b>TFN</b>
<b>SPOUSE</b>	<b>D.O.B.</b>	<b>TFN</b>
<b>EMAIL</b>		
<b>WORK #</b>	<b>HOME #</b>	<b>MOBILE #</b>
<b>ADDRESS</b>		
<b>POSTAL</b>		

**Bank Details** (As of 1 July 2013, if you are expecting a refund, you MUST provide the ATO your EFT Bank Details)

<b>BANK NAME</b>	<b>BSB #</b>	<b>ACCOUNT #</b>	<b>ACCOUNT NAME</b>
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#### Children

<b>NAME</b>	<b>D.O.B.</b>
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**PAYG Payment Summaries** (please attach all documents to the back of the form)

EMPLOYER	OCCUPATION	GROSS	TAX
		\$	\$
		\$	\$
		\$	\$
		\$	\$
		\$	\$

**Bank Interest**

BANK	AMOUNT	TFN CREDITS	BANK CHARGES
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$

**Work & Other Expenses** (please attach your detailed listing to the back of the form)

EXPENSE TYPE	AMOUNT	EXPENSE TYPE	AMOUNT
Taxi Fares	\$	Reference Books	\$
Other Travel	\$	Stationery	\$
Uniform / Laundry	\$	Mobile Phone	\$
Sun Protection Items	\$	Internet	\$
Self-Education	\$	Memberships	\$
Union Fees	\$	Tools & Equipment	\$
Seminars / Prof Development	\$	Interest Expenses	\$
Gifts & Donations	\$	Income Protection Insurance	\$
Other Expenses	\$	<i>(please include in detailed listing)</i>	

VEHICLE MAKE	MODEL	WORK KM'S

## MOTOR VEHICLE INFORMATION

### Vehicle & Log Book

<b>LOGBOOK KEPT</b> <input type="checkbox"/> Y <input type="checkbox"/> N	<b>PERIOD COVERED BY LOGBOOK</b> <small>(within last 5 financial years)</small>	
<b>VEHICLE PLATE NO.</b>	<b>MAKE &amp; MODEL</b>	
<b>OWNER OF VEHICLE</b>	<b>DRIVE OF VEHICLE</b>	
<b>TOTAL KMs TRAVELLED IN YEAR</b>	<b>BUSINESS KMs IN LOGBOOK PERIOD</b>	
<b>DATE PURCHASED</b>	<b>PURCHASE PRICE</b>	\$
<b>HOW WAS VEHICLE FINANCED?</b> <input type="checkbox"/> Lease <input type="checkbox"/> Paid Cash <input type="checkbox"/> Chattel Mortgage <input type="checkbox"/> Hire Purchase		
<b>DATE SOLD</b> <small>(if in this tax year)</small>	<b>SALE PRICE</b>	\$

### Running Costs

COST TYPE	ANNUAL AMOUNT (inc. GST)	MONTHLY PAYMENTS
Fuel / Oil	\$	
Registration	\$	<i>Please provide a copy of your Hire Purchase / Lease / Chattel Mortgage Agreement when you reach the end of the form.</i>
Insurance	\$	
Repairs & Maintenance	\$	
Lease Payments	\$	
Hire Purchase / Chattel Mortgage Payments	\$	\$
Interest Paid	\$	\$
Services	\$	\$
Tyres / Battery	\$	\$
Membership Fees	\$	\$
Parking & Tolls	\$	\$

### Private Health Insurance

Do you have private health insurance?  Y  N **YES** - please provide your Private Health Statement

Did you have any Out of Pocket Medical Expenses?  Y  N **YES** - please provide details ONLY IF you made a claim in your 2016 & 2017 tax returns, unless they relate to disability aids, attendant/aged care

Do you have any of these items?  
Investment Income, Rental Properties, Investments Sold or Motor Vehicles used for Work  Y  N **YES** - please complete relevant sections below  
**NO** - please proceed to the end of the form, provide supporting documents, sign and send back to us.

### INVESTMENT INFORMATION

#### Dividends

COMPANY	DATE PAID	UNFRANKED	FRANKED	IMP. CREDITS	TFN CREDITS
		\$	\$	\$	\$
		\$	\$	\$	\$
		\$	\$	\$	\$
		\$	\$	\$	\$
		\$	\$	\$	\$

#### Unit Trusts

TRUST	TRUST INCOME	TFN CREDITS	IMP. CREDITS	CAPITAL GAINS	FOREIGN INCOME	FOREIGN TAX
	\$	\$	\$	\$	\$	\$
	\$	\$	\$	\$	\$	\$
	\$	\$	\$	\$	\$	\$
	\$	\$	\$	\$	\$	\$
	\$	\$	\$	\$	\$	\$

#### Investments Sold / Disposed

COMPANY / TRUST	DATE SOLD	NO. SOLD	AMOUNT RECEIVED	DATE PURCHASED	NO. PURCHASED	AMOUNT PAID
			\$			\$
			\$			\$
			\$			\$
			\$			\$
			\$			\$

**RENTAL PROPERTY INFORMATION** *Please complete one of these schedules per Property.*

**Property Details**

<b>ADDRESS OF RENTAL PROPERTY</b>	
<b>DATE PURCHASED</b>	<b>DATE RENTAL INCOME FIRST EARNT</b>
<b>NO. WEEKS AVAILABLE FOR RENT</b> <i>(this year)</i>	<b>DATE BUILT</b>
<b>OWNERSHIP DETAILS</b> <input type="checkbox"/> In your name <input type="checkbox"/> In joint names <i>(please provide details)</i>	

*Please provide the purchase settlement statement and other purchase costs, e.g. stamp duty, legal fees, renovations or initial repairs, and any loan application fees and/or mortgage discharge expenses when you reach the end of the form.*

**Income**

GROSS RENT	OTHER RENTAL INCOME
\$	\$

**Expenses**

EXPENSE TYPE	AMOUNT	EXPENSE TYPE	AMOUNT
Advertising for Tenants	\$	Body Corporate Fees	\$
Borrowing Expenses	\$	Cleaning	\$
Council Rates	\$	Gardening / Lawn Mowing	\$
Insurance	\$	Interest on Loan(s)	\$
Land Tax	\$	Legal Fees	\$
Pest Control	\$	Property Management Fees	\$
Repairs & Maintenance	\$	Property Man. Commissions	\$
Travel*	\$	Stationery, Phone & Postage	\$
Water Charges	\$	Other Expenses	\$

*\*Please note that from 1 July 2017 travel expenses for rent collection, inspections, repairs and maintenance are no longer allowed by the ATO as result of the 2017 Budget.*

**Depreciable Items**

ITEM	DATE PURCHASED	COST
		\$
		\$
		\$
		\$



## **SUPPORTING DOCUMENT CHECKLIST**

- Payment Summaries
- Detailed Work Expenses Listing
- Private Health Statement
- Out of Pocket Medical Expense Claims
- Unit Trust Tax Year Summary
- Motor Vehicle Hire Purchase / Lease / Chattel Mortgage Agreement
- Rental Property Purchase Settlement Statement / Costs
- Rental Property Depreciation Schedule (as prepared by Third Party)
- Letter noting tax deductibility of Income Protection Premiums
- Confirmation letter from your superannuation fund noting intent to claim tax deduction for contributions