



**TAXNBOOKS**  
Accounting

Year: 20 .....

# Tax Questionnaire

Make your Tax return easy

Once we have reviewed your questionnaire response, we will contact you to clarify any issues it raises. Alternatively, if you want to discuss any issues on taxation, please make an appointment with the Tax Agent, Vea Matthews by phoning or e-mailing us.

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inside Mortgage Choice

[www.taxnbooks.com.au](http://www.taxnbooks.com.au)

## Personal Details

Surname  Given Names

Address   
 POSTCODE

Mobile phone

Date of birth / /

TFN  Number of Dependant children

Email

Main Occupation

**Private health insurance? Yes No**

If yes attached a copy of insurance tax statement issued by the fund

## Spouse or de facto spouse

Surname  Given Names  Spouse TFN

Date of birth / /  Taxable Income \$

If we do not complete your spouse's Income Tax Return, please complete the following:

- |                                  |                         |                                 |                         |
|----------------------------------|-------------------------|---------------------------------|-------------------------|
| - Reportable Fringe Benefits     | \$ <input type="text"/> | - Net Financial Investment Loss | \$ <input type="text"/> |
| - Reportable Super Contributions | \$ <input type="text"/> | - Net Rental Property Loss      | \$ <input type="text"/> |
| - Tax-Free Government Pensions   | \$ <input type="text"/> | - Child Support Payments        | \$ <input type="text"/> |

## Income

### Government Benefits

Yes  No

Have you received any New Start Allowance, Youth Allowance, or other Centrelink benefits?  
If yes, please attach Payment Summary from Centrelink.

### Dividends

Yes  No

Have you received any income from dividends?  
If yes, please include details

### Salary

Yes  No

Please attach tax return copy of PAYG Payment Summaries.

Number of PAYG Payment Summaries

### Investments and Managed Funds

Yes  No

Have you received any income from Investment or Managed Funds?  
If yes, please attach the relevant annual tax statements.

### ETP

Yes  No

Have you received any Employment Termination Payments?  
If yes, please attach ETP Payment Summaries.

### Employee Share Schemes

Yes  No

Did you acquire shares under an Employment Share Acquisition Scheme? If yes, please provide details.

### Rent

Yes  No

Have you earned any income from rent?  
If yes, please refer to the attached Rental Property Schedule.

### Other income

Yes  No

Have you received any other income?  
If yes, please attach a brief description and show the amount.

### Partnerships and trusts

Yes  No

Have you received any income from trusts or partnerships?  
If yes, please attach Annual Taxation Statement from the Trust.

### Superannuation Benefits

Yes  No

Have you received a lump sum or income stream from a superannuation fund?  
If yes, please provide relevant payment summary.

### Capital gains

Have you sold any investments such as property or shares? Yes  No

If yes, please include details such as the purchase and sale dates, as well as the purchase cost and sale proceeds.

## Interest

Have you earned any income from interest on accounts in banks, credit unions or building societies?  
If it was earned on joint accounts, please show only your share of the interest.

Bank/Branch	Account No.	Interest (Your Share)	Withholding Tax Paid (If any)

NOTES:.....

## Equipment/Asset above \$300 (To be depreciated)

You may claim for depreciation on the cost of items and equipment purchased to be used as part of your work or rental property (including equipment used in your home office, less % private use). You need to base your statement of percentage of private use on a pattern of usage recorded in a diary for at least one month.

If we completed your tax return last year, you only need to show items purchased that cost more than \$300.

If you are a new client and you depreciated any items last year, please attach a copy of the depreciation schedule.

Equipment	Purchase price	Date purchased	% private use

\* If insufficient space please attach a list

## Deductions

### Motor Vehicle Expenses.

Yes  No

Have you used your motor vehicle for work-related travel?

Type of car

Engine capacity in litres (e.g. 3.2L)  L

Vehicle Registration

Travel can be claimed for:

Tax agent visit/ongoing financial planning visits  Km

Regional meetings, in-service seminars, conferences  Km

School sports/camps\*  Km

School excursions  Km

Work experience  Km

Travel between split campus  Km

Travel to client premises  Km

Other  Km

**Total Km**  Km

\* Note: you cannot claim for travel to and from work, nor for trips to check prospective school camp sites.

### Travel (Overseas &/or Interstate)

Yes  No

Have you undertaken any work-related travel overseas or interstate?

If yes, please attach a summary of details

### Clothing (Protective &/or Uniform)

Yes  No

Have you purchased protective clothing or uniforms for work?

*Note: sports clothing is not allowed.*

*Please provide full details of uniforms required to be worn.*

Protective clothing/uniforms (Please describe) \$

Protective footwear \$

Laundry & cleaning of protective clothing or uniforms \$

Sunscreen/sunhats/sunglasses \$

### Self Education

Yes  No

Have you carried out study related to current work at a recognised educational institution?

\*Note: HECS - HELP payments are not an allowable deduction.

If yes, please attach a summary

### Other Deductions

Yes  No

If there is anything else you can claim, please attach an itemised list and amount.

### Tax Agent

If we didn't prepare your tax return last year, please state the name of the tax agent and how much you paid for the service.

Name of tax agent

Fee \$

### Financial Planning

Yes  No

Professional fee paid for **ongoing** financial advice.

Name of adviser

Fees and any other relevant expenses \$

### Other Work Related Deductions

Yes  No

*If yes, please attach a list and an amount*

Expenses can be claimed for:

Licences / certificates renewals \$

Excursion costs - accompanying students \$

Stationery, craft items, teaching aids \$

Tools & equipment (under \$300 per item) \$

Professional journals / magazines \$

Seminars, conferences & short courses \$

Professional Associations \$

Overtime meals \$

Union fees  \$

Computer Consumables \$

### Telephone

Yes  No

Telephone (Landline)

Avg # of Calls  X  # of Wks (25c) \$

Telephone (Mobile)

Avg # of Calls  X  # of Wks (50c) \$

*Please only include business/work calls*

### Home Office Expenses

Yes  No

# of Hrs  X # of Wks  \$

**The commissioner requires a diary to be completed stating the number of hours worked at home over a continuous 4 week period.**

*This amount includes the usage of electricity, gas and depreciation of home office furniture and fittings. For example if you work an average of 12 hours per week at home your claim for home office expenses could be \$150 (12 hours @ 52 cents per hour over 48 weeks).*

Yes  No

\$  X  % (work usage) \$

### Charities

Yes  No

Have you made donations to registered charities or school building funds? Have you participated in a workplace giving program?

If yes, please attach itemised list and amount.

### Income Protection

Yes  No

Did you pay for Income Protection Insurance during the year?

If yes, how much? \$

## Supporting your claims

Each year, the Tax Office focuses on work-related expense claims. It is still important that you keep accurate receipts and records to substantiate these claims, including log books for vehicle claims of more than 5,000 km. Reasonable estimates may be used for claims of less than 5,000 kms.

Please note, valid tax invoices must be retained for claims made in your tax return for 5 years after lodgment. For amounts less than \$10, receipts are not required up to a total of \$200, but full details must be recorded.

This year, the ATO is very keen on reviewing claims associated with investments and compliance issues for superannuation. It has established data links with organisations like banks, Centrelink and the State Revenue Office to compare tax returns with other information collected by those organisations. So don't assume the ATO will "never know" about the interest you earn from savings accounts, or social welfare benefits or assistance you may receive.

Superannuation, particularly self-managed super, is facing greater scrutiny. The ATO is determined to ensure super is put away for retirement and that taxpayers are not finding ways to access their super earlier, either directly or indirectly.

In the latter case, this means investment in holiday homes through a super fund, buying art to hang in the house or office, or using cash from super to pay off loans and so on.

If you have investments in shares or property, make sure that the interest you claim on any borrowed money is specifically for earning income and/or capital gain from your investments.

### PLEASE REMEMBER:

**The ATO can audit any taxpayer's return. If your return is selected, you don't want to end up paying back tax, interest on unpaid tax and possibly fines because you failed to properly account for any income or expenses in your income tax return.**

On a positive note, ensure you benefit from any entitlements available through the taxation system, including:

- Superannuation Co-contribution.
- Family Tax Benefit (direct through Centrelink).
- Self assessment. You must support claims with the appropriate substantiation.

## Substantiation Declaration

Name

I,

HAVE READ AND UNDERSTOOD THE SUBSTANTIATION DECLARATION AND CAN FULLY SUBSTANTIATE ANY CLAIMS I HAVE MADE.

Signature

Date / /

Please note: This section must be signed.

**Would you like your completed Tax Return emailed directly to you?**

Yes  No

If yes, please ensure your email address

## Payment Options

Please **DEDUCT** my fee of \$    from:

**My Credit Card**  Visa  Mastercard

Cardholder Name

Card Number

Expiry Date /

Signature

## Please DEPOSIT my refund into:

Institution

Account Name

BSB Number

Account/Member Number

Signature

Date / /

•••Please ensure you complete ALL preferred payment/ deposit options correctly. Failure to do so may delay the processing of your assessment.

As of 1 July 2013, the Australian Taxation Office has requested where possible, Individual Tax Payers provide their Direct Debit details to ensure swift and accurate deposits of refunds.