

2010 TAX RETURN PREPARATION QUESTIONNAIRE

Full Name:					
Date of Birth:		Tax File Number:			
Current Address:					
Phone		Work:		Mobile	
Occupation:					
Spouse's Name and DOB					
Have you changed your name since your last return? (circle)	Yes		No:		
If yes, what was your previous Surname?					
Home Email Address		Work Email Address			

DEPENDANT CHILDREN

Dependant Child's Name and Date of Birth	Primary or Secondary School

INTEREST INCOME (Police Credit Union, Bank etc)

SELF EDUCATION EXPENSES. (Course taken at educational institution and connected to your current job)

Course Name	
Student Union Fees	
Course Fees (Not HELP Contributions)	
Travel (use of private vehicle, taxi, public transport) Kms	
Reference Books/Stationery	
Equipment	

DIVIDEND INCOME (If unsure, enclose Statement from Company)

Name of Public Company	Unfranked Amount	Franked Amount	Imputation Credit

MOTOR VEHICLE: Cents per kilometre method. (For work related travel such as training, courses or integral component of your employment. Cannot claim motor vehicle expenses for a salary sacrificed car)

Registration No.	Make	Model	Engine Size	Kilometres for Employment	Log Book Yes or No ?

DEPRECIABLE EQUIPMENT (Computer, Office furniture, printers, library, GPS, camera etc over \$300 in value)

Description	Date of Purchase	Purchase Price	Private Use Portion (%)

OTHER WORK RELATED DEDUCTIONS:

\$

\$

Laundering of Uniform/Corporate Ware/UC Max \$150		Undercover Incidental Expenses	
Dry Cleaning of Uniform/Wardrobe/UC		ID Wallet	
Purchase of Protective Clothing		Reference Books	
Purchase of Protective Footwear		Teaching Aids (Teachers only)	
Uniform Sewing and Medal Expenses		Parking and Toll Expense for Work Only	
Purchase of Corporate Wardrobe		Bag and/or Briefcase	
Purchase of Undercover Clothing		OSG Equipment and Fitness Expenses	
Computer Stationery for Employment		Portable Radio Holder	
Use of Private Mobile Phone for Employment		Leatherman Tool	
Work Related Internet Expenses		Knife	
Journals and Periodicals (APJ)		Excursion Expenses (Teachers)	
Leather pouch and other equipment		Stationery	
Union Fees/Subscriptions		Street Directory	
Sunglasses, sunhats and sunscreens		Torch	
Legal Fees		First Aid Course	
Use of Private Land Telephone for Employment		Tax Agent Preparation Fee (NEW CLIENTS ONLY) Plus kilometers travelled for interview.	

RENTAL PROPERTY Note. If you have an annual financial report from your real estate, please enclose.

Address of Property			
Ownership %	Last Name	First Name/s	
Date of Purchase	Date of 1 st Rental	No of Weeks Rented	weeks
Gross Rental Income \$		Expenses \$\$\$	
Loan Interest On Borrowed Monies			
Land Rates			
Water Rates			
Commission to Real Estate			
Strata Fees (Body Corporate Expense)			
Borrowing Expenses			
Pest Control.			
Leasing/Letting Fees/Advertising			
Travel Expenses (Kilometres or \$ airfare please)			
Accommodation Expenses (if long distance)			
Gardening/Lawn Mowing			
Landlord Insurance			
Postage Expenses			
Repairs & Maintenance			
Bank Charges			
Depreciation Inspection Report.			

PRIVATE HEALTH INSURANCE.

Do you have private medical cover the entire year.	Yes Name of Fund/Membership No	No. (see next question)
If you have no private health insurance and your income is over 70K (140K for family) you maybe charged an extra 1% Medicare levy. What was your spouse's income or are you a sole parent?	\$	
Out of Pocket Medical Expenses up and above \$1500. (After Medicare/Private Health)	\$	

Donations (Charitable Organizations)	\$

EDUCATION OFFSET EXPENSES (Primary School Max \$375, High School Max \$750 per child)

Computer and/or Laptop	
Computer- Related Equipment	
Home Internet	
School Stationery, textbook for each student	
Tools of Trade (each student)	

Direct Crediting.

If you would like your tax refund direct credited to your nominated account please provide me the following

- a. Account Name
- b. BSB and Account Number.

DECLARATION.

My engagement is to prepare and lodge your annual income tax return. Before I lodge any tax return on your behalf, I will forward a copy to you for approval and signing. I will endeavour to ensure that the return is lodged by the due date. If you are late in providing information, I will do my best to meet the time limits, but I will not be responsible for any lodgments penalties that you may incur.

The tax return which I specially engaged to prepare, together with any original documents given to me by you, shall be your property. Any other documents brought into existence by me, including this questionnaire and general working papers will remain my property at all times.

Our agreed fee is only for the preparation and lodgment of your taxation return. Any additional services or advice that you requested are not included in this agreed fee.

It is expected that, in respect of your taxation return, that you will comply with the substantiation provisions of the Income Tax Assessment Act. My fee for the preparation and lodgment of your taxation return does not cover any inquiries or investigations conducted by the Australian Taxation Office.

ACKNOWLEDGMENT OF TERMS OF ENGAGEMENT.

I..... confirm I understand and agree to your terms of engagement.

Dated the day of 2010

..... (Sign here please)