

2011 TAX RETURN PREPARATION QUESTIONNAIRE

Brian Sullivan Tax Agent Mailing Address: 16 Sainsbury Close, Terrigal NSW 2260

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

Childs Name	Date of Birth

INTEREST INCOME

Financial Institution (Police Credit Union, Bank etc)	Interest Income \$

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

Course Name	
Student Union Fees	
Course Fees (Not HECS Contributions)	
Travel (use of private vehicle, taxi, public transport)	
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. (Cannot claim motor vehicle expenses for a salary sacrificed car)

Registration No.	Make	Model	Engine Size	Kilometres for Employment	

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 Max \$150 without receipts		OSG Fitness Expenses	
Dry Cleaning of Uniform/Wardrobe		ID Wallet (Police)	
Purchase of Protective Clothing		Reference Books	
Purchase of Protective Footwear		Teaching Aids	
Uniform Sewing and Medal Expenses		Parking and Toll Expense.	
Purchase of Corporate Wardrobe		Carrybag.	
Use of Private Telephone for Employment		OSG Equipment	
Computer Stationery for Employment		Portable Radio Holder (Police only)	
Use of Private Mobile Phone for Employment		Leather man Tool or similar (Police)	
Internet Expenses (work only)		Knife, Torch and Batteries	
Journals and Periodicals		Excursion Expenses (Teachers)	
Seminars and Courses		Stationery	
Union Fees/Subscriptions		Street Directory	
Sunglasses, sunhats and sunscreens		Tools and Equipment	
Legal Fees		First Aid Course	

RENTAL PROPERTY

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.				

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

PRIVATE HEALTH INSURANCE.

Do you have private medical cover the entire year.	Yes Name/Membership No	No. (see next question)
If you have no private health insurance and your income is over 70K (140K for family) you will be charged an extra 1% Medicare levy. What was your spouse's income if a family?	\$	

Donations	\$

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

\$

Computer	
Computer- Related Equipment	
Home Internet	
School Stationery and textbooks etc	
Tools of Trade	

Direct Debiting.

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

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

***There is an admin fee of \$10 for direct debiting.**

YOUR 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 200

..... (Sign here)