

2013 TAX RETURN PREPARATION QUESTIONNAIRE

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|---|------------|------------------|--|
| Full Name: | | | |
| Date of Birth: | | Tax File Number: | |
| Current Address: | | | |
| Email Address | | | |
| 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? | | | |
| Mobile Number | | Skype Address | |

DEPENDANT CHILDREN

| Dependant Child's Name and Date of Birth | Primary or Secondary School |
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INTEREST INCOME (Financial Institutions such as Banks and Credit Unions)

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

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| Course Name | |
| Course Fees | |
| Stationery | |
| Travel (use of private vehicle, taxi, public transport) Kms | |
| Reference Books | |
| Equipment such as computers and associated hardware. | |

DIVIDEND INCOME (If unsure, enclose Statement from Company)

| Name of Public Company | Unfranked Amount | Franked Amount | Imputation Credit |
|------------------------|------------------|----------------|-------------------|
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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 ? |
|------------------|------|-------|-------------|---------------------------|----------------------|
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DEPRECIABLE EQUIPMENT (Computer, Office furniture, printers, library, GPS, camera etc over \$300 in value)

| Description | Date of Purchase | Purchase Price | Private Use Portion (%) |
|-------------|------------------|----------------|-------------------------|
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OTHER WORK RELATED DEDUCTIONS:

| | \$ | | \$ |
|---|----|---|----|
| Laundrying of Uniform/Corporate Ware/UC <i>Max \$150</i> | | Undercover Incidental Expenses (Police) | |
| Dry Cleaning of Uniform/Wardrobe | | ID Wallet | |
| Purchase of Protective Clothing | | Reference Books | |
| Purchase of Protective Footwear | | Teaching Aids (<i>Teachers only</i>) | |
| Uniform Sewing and Medal Expenses | | Parking and Toll Expense for Work Only | |
| Purchase of Corporate Wardrobe | | Carry bag | |
| Purchase of Undercover Clothing (<i>Police</i>) | | Fitness & Gym Expenses (<i>Specialist Police</i>) | |
| Purchase of Uniform | | Portable Radio Holder (<i>Police</i>) | |
| Use of Private Mobile Phone for Employment | | Leatherman Tool | |
| Work Related Internet Expenses | | Subscriptions | |
| Journals and Periodicals | | Excursion Expenses (<i>Teachers</i>) | |
| Home Office Expenses (<i>Teachers or Educators</i>) | | Stationery | |
| Union Fees/Subscriptions | | Professional seminars, courses, conferences and workshops | |
| Sunglasses, sunhats and sunscreens | | Torch | |
| Computer Stationery for Employment Only | | Computer Repairs | |
| Use of Private Land Telephone for Employment | | Tax Fee Prior Year (<i>new client only</i>) | |

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

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|---|-----------|--------------------------------|--------------------------|
| 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/Postage | | | |
| Travel Expenses (Kilometres or \$ airfare please) | | | |
| Accommodation Expenses (if long distance) | | | |
| Gardening/Lawn Mowing | | | |
| Landlord Insurance | | | |
| Land Tax | | | |
| Repairs & Maintenance | | | |
| Bank Charges | | | |
| Depreciation Inspection Report. | | | |

PRIVATE HEALTH INSURANCE.

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| Did you have private medical cover the entire financial year? <i>If you have received a fund statement, please forward to me.</i> | Yes Name of Fund Membership No | No. *** |
| ***If you have no private health insurance and your income is over 84K (168K for family) you may be charged an extra 1% to 1.5% extra Medicare levy. <i>Your extra surcharge is now income tested.</i> | If you have a spouse and I DO NOT prepare your spouse's tax, I require your spouse's income for 2013. \$ | IMPORTANT What was your spouse's income or are you a sole parent? (SEE LEFT) |
| Out of Pocket Medical Expenses <i>(After Medicare and Private Health reimbursements and you can only claim up and above \$2120)</i> | \$ Please deduct what Medicare and/or health fund reimburse you. | |

| Donations (Charitable Organizations) | \$ |
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Direct Crediting of your tax refund. (NO EXTRA FEE)

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 endeavor 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 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 20

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