

2015 Tax Season

Attached to this covering letter is your annual Tax Preparation Questionnaire that you can utilise to have your tax return completed and lodged by me. My questionnaire has been designed by me to accommodate people who have a busy lifestyle and cannot attend my home office at Terrigal for a person to person interview. Also the questionnaire caters for people who reside some distance away from my office. With technology today like email, text and social media, communication is not a problem. My questionnaire can also be downloaded from my website www.bnstax.com.au in case you need another copy.

All you need to do is complete your questionnaire, attach your payment summary(s), health fund statement (if applicable) and return the documentation to me preferably by email attachment (bnstax@optusnet.com.au) NOTE. The **FAX** line to my office has been discontinued.

However, if you wish to have a **person to person** interview at my home office at Terrigal, could you please contact me at your earliest convenience to make an appointment. Interviews start the first weekend in July until the end of October and are on **SATURDAYS** only.

My 2015 Fees start from **\$99**

- Individual Tax Return (Questionnaire) \$99 (email/mail)
- Individual Tax Return (Questionnaire) with fee from refund \$109
- Individual Tax Return (Interview at Office) \$110
- Individual Tax Return (Interview at Office) with fee from refund \$115
- Individual Tax Return (ALL Electronic) with fee from refund \$149.
- **PREMIUM Tax Return (ALL Electronic) with your tax return done in 48 working hours \$175**

My fee includes the preparation, approval and electronic lodgment of your individual tax return.

Look forward to hearing from you.

Brian Sullivan

16 Sainsbury Close

TERRIGAL NSW 2260

Mobile 0413 759617

bnstax@optusnet.com.au

www.bnstax.com.au

JOIN ME ON FACEBOOK <http://facebook.com/BNSTAX>

2015 TAX RETURN PREPARATION QUESTIONNAIRE

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

DEPENDANT CHILDREN

Dependant Child's Name	Date of Birth

INTEREST INCOME (Financial Institutions such as Banks and Credit Unions)

Financial Institution	\$

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

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

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:

	\$		\$
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 and Educators only</i>)	
Uniform Sewing and Medal Expenses		Parking and Toll Expense for Work Only	
Purchase of Corporate Wardrobe		Carry bag and tactical 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 and Memberships.	
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 and Batteries	
Computer Stationery for Employment Only		IPAD and tablet. (less than \$300)	
Use of Private Land Telephone (on call)		Tax Fee Prior Year (<i>new client only</i>)	

RENTAL PROPERTY *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	
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					
Sundries					

PRIVATE HEALTH INSURANCE

Did you have private medical cover the entire financial year (Yes / No)? <input type="text"/> <i>If you have received a fund statement, please forward to me.</i>	Name of Fund <input type="text"/>	Membership No <input type="text"/>
***If you have no private health insurance and your income is over 90K (180K 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 our spouse's tax, I require your spouse's income for 2015. \$ <input type="text"/>	<p style="text-align: center;">IMPORTANT</p> 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). The ATO is phasing out this offset and you can only claim with 20% rebate if you have claimed out of pocket medical expenses in your 2013 Tax. It is also income tested.</i>	\$ <input type="text"/> Total Figure	

Donations (Charitable Organizations)	\$

Direct Crediting of your tax refund.

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

Account Name

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

Digital Signature

PLEASE CIRCLE YOUR PREFERENCE. IMPORTANT

- A. I would like my tax prepared from this questionnaire with an account. \$99
- B. I would like my tax prepared with your fee taken from my refund \$109
- C. I would like my tax prepared completely paperless/electronic utilizing my quoted email address \$149
- D. I would like my tax prepared completely paperless/electronic with premium turnaround (48 hours) \$175.