



Keeping more of YOUR money in  
YOUR pocket

Liability limited by a scheme approved under Professional Standards Legislation.

**Individual Tax Kit**

TFN:	
Name:	
Address:	
Phone Number:	H) W) M)
Email address:	
Occupation:	
Bank Account details	BSB: Acct No: Name:
Spouse Details	Name: DOB: Email: Phone:

If you are a new client please provide a copy of your previous tax return.

**Please provide all income evidence such as:**

- 1 PAYG Payment Summary/s Including any allowances** YES / NO
- 2 ETP Payments** YES / NO
- 3 Government Allowances or Payments** YES / NO
- 4 Government paid pensions** YES / NO
- 5 Australian annuities and Superannuation Streams** YES / NO
- 6 Australian Superannuation lump sum payments** YES / NO
- 7 Attributed Personal Service Income** YES / NO
- 8 Gross Interest** YES / NO  
If so please provide details
- 9 Dividends** YES / NO  
If so please provide details
- 10 Rental Property** YES / NO  
(If you have a rental property please refer to Rental Tax Kit)

**Capital Gains: If you have sold shares/investment property in the current financial year please provide:**

- Contract date of Purchase of Shares/Property
- Purchase cost of the Shares/Property
- Purchase costs involved:
  - Brokerage Fees
  - Other, such as legal fees, agent commission, stamp duty
- Contract date of sale of the Shares/Property
- Sale Price
- Brokerage Fees
- Other, such as legal fees
- Any other relevant information you are able to supply

**Foreign Income: If you have foreign sourced income, please provide details of pension, employment income and / or investment income from overseas.**

**DEDUCTIONS**

***\*It is your responsibility to keep all your receipts to substantiate your claims, these receipts must be kept for 5 years from the date of lodgement\****

**D1 - Work related car expenses**

**YES / NO**

Work related travel might include, amongst other things:

- Visiting customers – existing and potential
- Attending meetings
- Attending training seminars
- Travelling between work sites

**If you have work related car expenses, please provide as much of the following information as possible to enable Taxpert to determine the best deduction for you.**

- the number of kilometres that you travelled on behalf of your employer according to your estimate
- a copy of the log book that you have kept
- the odometer reading at the beginning of the year
- the odometer reading at the end of the year
- a summary of the different costs incurred in running the car
- a copy of the finance contract where you acquired the car
- what you paid for the car originally
- when you bought the car
- Did you have the car for the whole year?

**D2 – Other Travel Expenses**

**YES/NO**

- Airfares \$
- Accommodation / Meals \$
- Parking and tolls \$

**D3 – Work related uniform****YES / NO**

- Amount spent on uniform \$
- Laundry (if logoed or protective)
- Dry Cleaning \$

\*Please note you must keep all receipts for uniform and dry-cleaning expenses

**D4 – Work Related Self-education expenses****YES / NO**

- Student Union fees \$
- Course fees \$
- Travel, if so how many km's travelled?
- Text books \$
- Stationery \$
- Other, such as internet usage, asset purchases

Name of course undertaken:

Does the course relate to your existing work?

YES / NO

Does your employer encourage / support you in this course?

YES / NO

How many hours per week (on average) did you study at home?

**D5 – Other Work-Related expenses****YES / NO**

- Trade Union \$
- Telephone / Mobile \$\_\_\_\_\_ per month and what % is work related? \_\_\_\_\_%
- Internet \$\_\_\_\_\_ per month and what % is work related? \_\_\_\_\_%
- Home Office, how many hours do you work at home
- Tools and Equipment
  
- Memberships and Subscriptions
  
- Stationary / Journals
  
- Sun Protection
  
- Out of pocket expenses for seminars and training
  
- Work Related assets purchased over \$300, if so please provide date of purchased and price

**D9 – Donations**

**YES / NO**

- Please provide \$ amount and name of society
- School building funds \$

**D6 – Interest and dividend expenses**

- Bank Fees \$
- Interest \$
- Ongoing financial advice\$

**D10 – Cost of managing tax Affairs**

**YES / NO**

Travel to tax agent Bus/ taxi fare \$ or ..... km’s travelled

**D15 – Other Deductions / Income Protection Insurance**

**YES / NO**

Insurance provider ..... Amount of policy \$

If you have income protection insurance please provide a copy of the policy

**MEDICARE**

**Do you have Private Health Insurance**

**YES / NO**

- If yes please provide a copy of the schedule provided at the end of financial year

**Do you have a spouse for tax purposes**

**YES / NO**

- If yes please provide spouses taxable income

**Do you have any dependent children**

**YES / NO**

- If yes please advise of number of dependents

**DO YOU HAVE ANY OF THE FOLLOWING;**

**HELP or SFSS debt,**

**Child Support or**

**any debts to any other government departments i.e. Centrelink**