



Keeping more of YOUR money in
YOUR pocket

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 ___per week or ___per month
- 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 annual schedule provided at the end of financial year from your health fund.

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