

Tax Return Information Form

Section A and B must be completed every year.

2018 Individual Tax Return

A. INFORMATION FOR 2018 TAX RETURN (1 July 2017 to 30 June 2018)

Name			Spouse Name		
DOB			Spouse DOB		
Residential Address			Spouse Taxable Income		
TFN		Email			
Phone	W		M		

B. BANK DETAILS (If you are expecting a refund, you MUST provide the ATO your EFT Bank Details)

Account Name		Bank Name	
BSB		Account No.	

C. CHILDREN

Name		Name	
DOB		DOB	
Name		Name	
DOB		DOB	

D. PAYG PAYMENT SUMMARIES (Please attach)

EMPLOYER	OCCUPATION	GROSS	TAX
		\$	\$
		\$	\$
		\$	\$

E. BANK INTEREST / DIVIDENDS / ETC

DETAILS	AMOUNT
	\$
	\$
	\$
	\$

F. WORK & OTHER EXPENSES (Please attach or email detailed listing)

Motor Vehicle	See Worksheet	Reference Books	\$
Parking	\$	Stationery	\$
Tolls	\$	Mobile Phone	\$
Taxi Fares	\$	Internet	\$
Other Travel (Interstate or Overseas)	\$	Memberships	\$
Uniform/Laundry	\$	Tools & Equipment	\$
Sun Protection Items	\$	Personal Super Contributions	\$
Work from Home (Hours per Week)		Gifts & Donations	\$
Union Fees	\$	Income Protection Insurance	\$
Seminars/Prof Development	\$	Tax Agent Fees	\$

G. PRIVATE HEALTH INSURANCE

Do you have Private Health Insurance? ☐ Yes - Please provide Private Health Statement
☐ No

H. OTHER

Do you have any of these items?	<input type="checkbox"/> Investment Income	<input type="checkbox"/> Rental Properties		
	<input type="checkbox"/> Investment Sold	<input type="checkbox"/> Motor Vehicles used for Work		
Would you like a review of?	<input type="checkbox"/> Mortgage	<input type="checkbox"/> Wills	<input type="checkbox"/> Insurance	<input type="checkbox"/> Business Ideas
Are you on a Visa or are you a temporary resident?	<input type="checkbox"/> Yes			
	<input type="checkbox"/> No			
Do you use the MyGov System and have you linked it with the ATO?	<input type="checkbox"/> Yes			
	<input type="checkbox"/> No			
How would you like to sign your tax return?	<input type="checkbox"/> emailed as attachment	<input type="checkbox"/> posted		
	<input type="checkbox"/> using Docusign	<input type="checkbox"/> in person		