



Tax Return Year

Name

Date of Birth

Email

Address

Phone Number

Are you an existing client? Yes No

Where did you hear about us?

Do you have a copy of your last lodged return? Yes No

Did you have a spouse during the financial year? Yes No

Spouse Full Name

Spouse Date of Birth

How many dependents do you have?

A Child is only your dependent if they are under 21, or 21 to 24 and studying full time

Please provide Bank Account Details

Would you like to pay fee from refund? Yes No

(an extra \$33.50 will apply)



Income

What is your main Occupation?

	Yes	No	Comments
Salary or Wages			
Allowances, earnings, tips, directors fees etc.			
Employer Lump Sum Payments			
Employment Termination Payments			
Australian Government Pensions and Allowances			
Australian Annuities and Superannuation income streams			
Interest			
Dividends			
Employee share schemes			
Distributions from partnerships and/or Trusts			
Personal Services Income			
Sole Trader Income			
Capital Gains - Property, Shares or Crypto			
Foreign income			
Rent			
Pandemic Leave Disaster Payments**			

(* Please add up all Pandemic Leave Disaster Payments from your bank statements or from Centrelink letters

**PLEASE NOTE: the Covid-19 Disaster Payment for people affected by Covid restrictions is a NON TAXABLE INCOME and shouldn't be included.)

Did you run a business as a sole trader or contractor this year?

Details of how records are kept:

Xero		MYOB Accountright	
Quickbooks Online		Spreadsheet	
Reckon Hosted		Other	
MYOB Essentials			

We will need access to income and expenses. Please provide an invite to any software to admin@solutionsaccounting.com.au



Rental Properties

If the property was purchased or sold in this financial year, or it is the first year that we are completing the return, please provide the following:

	Yes	No	N/A
Purchase Contract			
Settlement Statement			
Loan Documents			
Legal Fees			
Stamp Duty			
Quantity surveyors report			
Sale Contract			

Address of the rental property

Street Address

City State

Post Code

Date that the property was first available for rent

Number of Weeks that the property was available for Rent

Number of Weeks rented

Rental Income and Expenses

	Yes	No	N/A	Comments
Rental Income and Expenses (Agent Summary)				
Rental Income - paid directly to owner				
Interest on Loans				
Advertising				
Bank Charges				
Body Corporate				
Borrowing Expenses				
Cleaning				



Council Rates				
Gardening				
Insurance - Building				
Insurance - Landlord				
Legal Expenses				
Pest Control				
Agent Fees / Commission				
Stationary, Telephone and Postage				
Water				
Other				

Was the loan renegotiated this year?

Deductions

Please Provide Evidence (If Applicable)

Work-Related Car Expenses

Do you use your car for work? (not including travel to and from work) Yes No

Do you have a log book? (a log book must be kept for 12 weeks and is valid for 5 years) Yes No

How many km have you travelled for work?

What % business use is your logbook

What is your vehicle make?

Work Related Travel Expenses

Do you have any work related Travel? Yes No

Did you receive a reasonable travel allowance? Yes No

Please indicate the types of travel expenses you incurred.

	Yes	No	N/A
Meals			
Accommodation			
Flights			
Other			



Work-Related Clothing, Laundry, and Dry Cleaning Expenses

Do you have any Uniform Expenses?

You can claim a deduction for the costs you incur to buy, hire, or repair clothing (and footwear) if it falls within one of these categories:

	Yes	No	N/A
Protective Clothing			
Occupation Specific Clothing			
Non Compulsory Uniform (registered with AusIndustry)			
Compulsory Uniform			

Laundry - How many loads per week?

The ATO has different rates applicable for Laundry Expenses depending on whether they are mixed with conventional clothing or just work clothes being laundered. Please indicate:

Work Clothes only	
Mixed	

Self Education Expenses

You can claim self-education and study expenses you incur when the course you take leads to a formal qualification and meets the following conditions:

1. maintains or improves the specific skills or knowledge you require in your current employment activities
2. results in or is likely to result in, an increase in your income from your current employment activities.

Do you have any Self Education Expenses?

Yes

No

Work Related Expenses

Do you have any of the following?

	Yes	No	N/A
Union Fees			
Course Fees			
Books / Stationary			
Depreciation			
Travel			
Other - please provide details			



Union Fees			
Books			
Professional Memberships			
Telephone and Internet			
(please provide % work use and total bill)			
Sun Protection / Sunglasses if required to work outside			
Equipment Purchases			
Seminars/ Courses			

Home Office

If you work from home, you can claim a deduction for the additional expenses you incur. There are 3 methods of doing this:

1. *Shortcut method - You can claim a deduction for each hour worked from home. This does not include time for minimal tasks such as checking emails. You do not need a dedicated work area. This rate covers all costs*
2. *Fixed Rate Method - 52 cents per hour. You must have a dedicated work area. You can separately claim phone, internet, consumables and depreciation. Please provide details*
3. *Actual Costs - please provide area of house and area of office along with actual operating costs of equipment.*

Did you work from home during the year? Yes No

Number of Hours worked per week

Please provide details if work patterns changed during the year

Other Deductions

Other expenses to consider (please provide receipts)

	Yes	No	N/A
Tax Agent Fees			
Donations			
Interest on loans relating to investments			
Income Protection Insurance			



Did you make any personal superannuation contributions? Yes No
 Has a notice of intention to deduct the contribution been sent to the fund? Yes No

Tax Offsets

Do you have private health insurance? Yes No
 Does this cover you and ALL of your dependents for hospital cover? Yes No
 Did you work in a remote area? Yes No
 Please provide location and number of days

Spouse Details

Did you have a spouse for the full year? Yes No
 From To
 Did your spouse die during the income year? yes

Spouses Taxable income

(please provide if we are not completing spouse return or upload a copy of their return)

Amount	
Taxable Income	
Spouses Assessable First Home Owner Super Saver released amount	
Reportable Fringe benefits (employer exempt from FBT)	
Reportable Fringe benefits (employer not exempt)	
Government Pensions	
Reportable Superannuation Contributions	
Deductible Personal Superannuation Contributions	
Foreign income	
Exempt foreign income	
Financial Investment Loss	
Net Rental Property Loss	
Child Support Paid	

Please note: Someone will be in contact within the next 24 hrs to get details of tax file number and have an engagement letter signed