**PERSONAL TAX RETURN FORM**

Thank you for allowing us to assist with your personal tax this year.

Please complete the below form as best you can and email it to us for fast and thorough preparation of your personal tax return.

Once we receive your completed form, we will then draft up your tax return and email it back to you for lodgement approval. If we have any queries, we will phone you or email through a list of questions.

**New clients:** if possible, please email through a copy of last year's tax return.

**Personal Information:**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Full name: |  |  |  |  |
| Address: |  |  |  |  |
| Is this address the same as it was on last year's tax return? | Yes | **☐** | No | **☐** |
| Mobile number: |  |  |  |  |
| How did you hear about us? |  |  |  |  |
| TFN: |  |  |  |  |
| DOB: |  |  |  |  |
| Occupation: |  |  |  |  |
| Were you an Australian Resident for the full year? | Yes | **☐** | No | **☐** |
| Number of dependent children: |  |  |  |  |
| Were you in receipt of JobKeeper during the financial year? | Yes | **☐** | No | **☐** |
| Did you have private health insurance during the year? | Yes | **☐** | No | **☐** |

**Checklist:**

Please type your information into this checklist. Generally, we do not require receipts. We will email you if we require further information. It is always best that you have your summaries ready before preparing this form.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Tax return financial year requested  *- please submit one form for each year required* |  |  |  |  |
| **Income** | | | | |
| Were you employed?  *- We can obtain your income information from the ATO* | Yes | **☐** | No | **☐** |
|  |  |  |  |  |
| Details of any interest income earned: |  |  |  |  |
| Details of any dividend income earned: |  |  |  |  |
| Your bank details (for deposit of refund). |  |  |  |  |
| Do you have a HECS/HELP/ or any other government debt? | Yes | **☐** | No | **☐** |
| Details of any government payments received: |  |  |  |  |
| Details of any other taxable income that you earned during the financial year. |  |  |  |  |
| Do you own any foreign investments? If so, what is their estimated value? | Yes | **☐** | No | **☐** |
| **Deductions** | | | | |
| Details of any verifiable deductions that you incurred during the financial year. These could include those listed in the section below. Feel free to enter totals into this section also. |  |  |  |  |
| Prior year accounting fee: |  |  |  |  |
| Donations made to registered charities.  *-Please list charity name and total.* |  |  |  |  |
| Work-related travel costs: tolls, parking, taxis, transport \_\_\_\_\_\_% relating to your work use |  |  |  |  |
| List all other motor vehicle expenses and their totals here:[[1]](#footnote-1) |  |  |  |  |
| Make & model of motor vehicle: |  |  |  |  |
| Is this car currently being paid off on finance? |  |  |  |  |
| Stationery, details of computer/laptop purchases (inc. date of purchase), Internet expenses, telephone costs.  -*Please nominate work-related % for all these costs.* |  |  |  |  |
| No. of days that you work from home if applicable? *(Home office running expenses deduction).* |  |  |  |  |
| **Rental** | | | | |
| Total income and expenses in relation to any rental properties that you own and rented out during the year, along with all rental expenses including assets purchased, depreciation and mortgage interest.  -*Spreadsheets welcome.* |  |  |  |  |
| Address of rental property:  *- If more than 1 property please email through a summary separately* |  |  |  |  |
| Did you rent out part of your own home that you live in on a service such as Airbnb?  If so, please provide length of time, revenue received, and a list of expenses for our team to apportion. E.g: mortgage interest, rates, electricity, Internet, and repairs.  *- Spreadsheets welcome.* |  |  |  |  |
| **Business – Sole Trader** | | | | |
| Sole Trader Information. List business / contracting income & expenses here:  If you aren't sure what you can claim, please contact our team for free assistance.  *- Spreadsheets welcome.*  *- If GST registered, please indicate if your figures are GST inclusive or exclusive.* |  |  |  |  |
| **Other Information** | | | | |
| Details of any other tax offsets or deductions that you believe you may be entitled to. Please also list any other information that you would like us to be aware of in this section. |  |  |  |  |
| Details of any asset sales during the year (shares/property). Remember to include both purchase and sales dates along with purchase price and sales proceeds. |  |  |  |  |
| Any other information that you think is relevant |  |  |  |  |

**Engagement as your tax agent for an individual income tax return**

We arepleased to accept an appointment as your tax agent for your **YEAR** tax return/s, and every year thereafter unless notified by you.

At the outset, we need to enter into an agreement with you setting out the terms on which we will assist you, including how we will charge you for the work.

This letter and the enclosed Terms of Business set out the terms of the engagement. Any additions will be by the written agreement of both parties. Please read this letter and the Terms of Business carefully. If the terms are acceptable to you, please sign and return this letter to us. If you do not return a signed copy of this letter, but continue to provide us with information and instructions, we will assume that you have accepted the terms contained in this letter.

**Scope of services**

As your tax agent *we* willprepare and lodge your individual income tax return

In addition to the financial information required to complete your tax return, it is expected that you will make available all relevant source documentation to *us.*

In preparing your individual tax return *we* will rely on the documents and information provided, and representations made by you.

**Matters outside the scope of services**

In performing the Services, *we* will not perform an audit. Accordingly, no assurances are made in this regard. This engagement cannot be relied upon to disclose irregularities including fraud, other illegal acts and errors that may exist. However, *we* will inform you of any such matters that come to *our* attention. In performing the Services *we* will not review the accuracy of any previous tax returns lodged by you or by a previous tax agent.

**Professional fee and payments**

|  |  |  |  |
| --- | --- | --- | --- |
| Standard Individual Income Tax Return | |  | $132 |
| plus | Rental Property |  | $66 per schedule |
|  | Small Business Schedule |  | $66 per schedule |
|  | Capital Gains Tax |  | $66 per schedule |
|  | *plus $132 per hour if further checking/calculations are needed* | | |

If we perform additional work for you that is not covered by this letter, we will charge you separately for that additional work.

|  |  |  |
| --- | --- | --- |
| The standard professional fees are | |  |
| Principle | | $198 per hour |
| Accountant |  | $132 per hour |
| Bookkeeping & Administration |  | $88 per hour |

For work undertaken for a period of less than an hour, the rate shall be charged in 15-minutes blocks, or part thereof.

All fees are GST inclusive.

Yours faithfully,Terry Dalby

Tax Agent No: 7127 4006

Text, letter

Description automatically generated

Date…………………………………………….………….

**Acknowledgement and confirmation**

I (tax payer), \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ hereby acknowledge and accept the terms of this engagement and agree to be liable for all fees for services performed in accordance with this agreement.

Signed……………………………………..…

Print Client’s Name……………………………………

Date…………………………………………….………….

1. *Please note that trips to and from your home and your place of employment are not tax deductible. Therefore, please do not include these. Trips must be for work required trips between two points that are not your home during the working day as required by your employed job.* [↑](#footnote-ref-1)