



Please complete this form to assist us in completing your income tax return.

Name: \_\_\_\_\_

Email: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_ Mobile: \_\_\_\_\_

Tax File Number: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

#### Bank Details

BSB: \_\_\_\_\_ Account Number: \_\_\_\_\_

1. What was your main occupation this financial year?

\_\_\_\_\_

2. Do you have any dependents? If so, how many, and what ages are they?

\_\_\_\_\_

3. Please let us know if there have been any changes in your family situation which may affect your tax. These include:

☐ Any of your children turned 16 since your last tax return

☐ New children

☐ Single/separation date \_\_\_\_\_

☐ New partner or married

☐ Any of your children have left home

Details: \_\_\_\_\_

4. Income:

- How many Income Statements (Payment Summaries/Group Certificates) including those for salary/wages, Centrelink and Pension income should the ATO have on records for you?

\_\_\_\_\_

- Have you earned any interest from your bank accounts? \_\_\_\_\_

Details: \_\_\_\_\_

- Have you received any dividends or payments from other investments? \_\_\_\_\_

Details: \_\_\_\_\_

- Did you run your own business? \_\_\_\_\_

If yes, we will need to gather more information regarding your business

Details: \_\_\_\_\_

- Have you sold any shares or other investments? \_\_\_\_\_

Please attach documents relating to their original purchase and their sale

Details: \_\_\_\_\_

- Have you bought or sold any investment properties this year (land/house etc)? \_\_\_\_\_

Details: \_\_\_\_\_

- Do you have a rental property? \_\_\_\_\_

If yes, I will forward you a rental property checklist

Details: \_\_\_\_\_

- Do you have holiday maker income? \_\_\_\_\_

Details: \_\_\_\_\_

5. Work Expenses:

- Do you ever use your own car for work, training, seminars, deliveries, client visits, carrying equipment weighing 20 kgs or more? \_\_\_\_\_

If Yes, where did you go? \_\_\_\_\_

How many kilometres have you travelled during the year for work purpose? \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

- Did you stay overnight anywhere for work purposes or travel by public transport? \_\_\_\_\_

Details: \_\_\_\_\_

- Do you have to wear a uniform or protective clothing for work? \_\_\_\_\_

Details: \_\_\_\_\_

- How much have you spent on uniforms or protective clothing (overalls, boots aprons) this year?

Details and amount spent: \_\_\_\_\_

- If you work outdoors, have you purchased sunscreen, hats or sunglasses? \_\_\_\_\_

If yes, details and amount spent: \_\_\_\_\_

- Have you undertaken any training (TAFE, University, Online) during the year? \_\_\_\_\_  
If Yes, did you pay for course fees, books, stationary, photocopying, accommodation, tools, internet, computer equipment or travelling costs relating to the course?

Details and amount spent: \_\_\_\_\_

- Have you paid for any membership fees, union fees, telephone calls, internet books, magazines, journals stationary, tools, computer equipment or any other expenses related to your work? \_\_\_\_\_

Details and amount spent: \_\_\_\_\_

➤ Did you work from home during the COVID-19 shutdown? \_\_\_\_\_

Details of hours spent: \_\_\_\_\_

## 6. Other

➤ Did you have any expenses relating to your investment income? \_\_\_\_\_

Details: \_\_\_\_\_

➤ Have you made any donations to charity? \_\_\_\_\_

If Yes, which ones and how much: \_\_\_\_\_

➤ How much did you pay for preparing your tax return last year?

Amount: \_\_\_\_\_

➤ What is your spouse's taxable income for the year? \_\_\_\_\_

Spouse's name and date of birth: \_\_\_\_\_

➤ Do you have sickness and accident insurance outside superannuation? \_\_\_\_\_

Details and amount spent: \_\_\_\_\_

➤ Did you make any personal superannuation contributions? \_\_\_\_\_

Details and amount: \_\_\_\_\_

➤ Have you or your spouse made child support payments? \_\_\_\_\_

Details and amount: \_\_\_\_\_

You can email me copies of the receipts and/or diary records (either via scan or taking a photo and emailing it). If you decide to only provide me with the amounts, please make sure you keep copies of the supporting documents for your records. Please note that the ATO requires that you keep copies of receipts for 5 years.

By signing below you agree that you have read and understood the substantiation declaration and agree you can fully substantiate any claim you have made.

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

### **Payment Methods**

- ☐ Eftpos, Visa or Mastercard (please note that a 2.2% fee is incurred)

Card holder name: \_\_\_\_\_

Card Number: \_\_\_\_\_ Expiry: \_\_\_\_\_ CCV: \_\_\_\_\_

- ☐ Fee from Refund (please note that a processing fee of \$25 applies).  
An Authority to Deduct Fees will be forwarded to you

- ☐ Direct Deposit

Account Name: Aimee Cole

BSB: 062-599

Account Number: 1021 2873

Should you have any questions, please do not hesitate to contact me via any of the following:

Email: [info@ascaccountants.com.au](mailto:info@ascaccountants.com.au) or [aimee.cole@outlook.com](mailto:aimee.cole@outlook.com)

Phone: 0447 515 315

Website: [www.ascaccountants.com.au](http://www.ascaccountants.com.au)

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