|  |  |
| --- | --- |
|  | **2025 Individual Tax Return**  **Questionnaire** |

1. Please **complete/confirm** your details below to the best of your knowledge.
2. All information supplied should be for the **period 1 July 2024 to 30 June 2025**, unless stated otherwise.
3. **Provide all supporting documents** where prompted and applicable.
4. 4**.** Sign where indicated and submit to our office or upload to our secure client portal via our website at
5. [https://canberrataxsolutions.com.au/client-portal](https://canberrataxsolutions.com.au/client-portal )
6. Once submitted we will review and book your review and sign off appointment with us.
7. See **Schedule A** for further details of what information we need to see your receipts for and how best to provide that information.
8. Please contact the office if you would like a copy of the Prefilling Report information available to us from the Australian Tax Office.

**YOUR CONTACT DETAILS**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **NAME** |  | **D.O.B.** |  | **GENDER:** |  |
| **SPOUSE** |  | **D.O.B.** |  | **TAXABLE INCOME:** |  |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **EMAIL** |  |  |  |  |  |
| **WORK #** |  | **HOME #** |  | **MOILE #** |  |
| **ADDRESS** |  |  |  |  |  |
| **POSTAL** |  |  |  |  |  |

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

*Please use the table below to advise of a different bank account to last year.*

|  |  |  |  |
| --- | --- | --- | --- |
| BANK NAME | BSB # | ACCOUNT # | ACCOUNT NAME |
|  |  |  |  |

**Dependent children’s details**

|  |  |
| --- | --- |
| NAME | Date of Birth |
| 1. |  |
| 2. |  |
| 3. |  |
| 4. |  |

Do all these children live with you?  Y  N

**Income Statements**  (please attach all manual Payment Summaries)

(Your employer should be registered for STP (Single Touch Payroll) you will not receive a payment summary. Instead, your Income Statement(s) will be shown as “Tax Ready” on your myGov account, we no longer require these).

|  |  |  |  |
| --- | --- | --- | --- |
| EMPLOYER | OCCUPATION | GROSS | TAX |
|  |  | $ | $ |
|  |  | $ | $ |
|  |  | $ | $ |
|  |  | $ | $ |

**Bank Interest** *(if you have more than 3 bank accounts, please provide us with a separate summary)*

|  |  |  |  |
| --- | --- | --- | --- |
| BANK | AMOUNT | TFN CREDITS | BANK CHARGES |
|  | $ | $ | $ |
|  | $ | $ | $ |
|  | $ | $ | $ |

**Work & Other Expenses** *(please attach your detailed listing /usage diary /itemised phone bill for 1 mth to the back of this form)*

|  |  |  |  |
| --- | --- | --- | --- |
| EXPENSE TYPE | AMOUNT | EXPENSE TYPE | AMOUNT |
| Taxi Fares | $ | Reference Books | $ |
| Other Travel | $ | Stationery | $ |
| Uniform / Laundry | $ | Mobile Phone | $ |
| Sun Protection Items | $ | Internet | $ |
| Self-Education | $ | Memberships | $ |
| Union Fees | $ | Tools & Equipment | $ |
| Seminars / Prof Development | $ | Interest Expenses | $ |
| Gifts & Donations | $ | Income Protection Insurance | $ |
| Tax Agent Fees | $ |  | |
| Home Office (WFH) Hours | **Please provide your 2025 FY** | **“Working from Home” Diary for us to discuss your claim** | |

|  |  |  |
| --- | --- | --- |
| Work related expenses |  | |
| ITEM | | COST |
|  | | $ |
|  | | $ |
|  | | $ |
|  | | $ |
|  | | $ |
|  | | $ |

**Private Health Insurance**

|  |  |  |
| --- | --- | --- |
| Do you have private hospital cover? | Y  N | ***YES*** *- please provide your Private Health Statement (Your Private Health Insurer may not supply you with a summary statement in 2022 FY the ATO has advised these are no longer compulsory)* |
| Please confirm who is covered by your private health insurance (i.e. yourself, your spouse and all of your dependents and the dates of cover, if applicable). |  |  |
| Do you have any of these items?  Investment Income, rental properties, **cryptocurrency** investments sold, or motor vehicles used for work or business purposes. | Y  N | ***YES*** *- please complete relevant sections below*  ***NO*** *- please proceed to the end of the form, provide supporting documents, sign, and send them back to us.* |

**Investment Income**

**Dividends**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| COMPANY | DATE PAID | UNFRANKED | FRANKED | IMP. CREDITS | TFN CREDITS |
|  |  | $ | $ | $ | $ |
|  |  | $ | $ | $ | $ |
|  |  | $ | $ | $ | $ |
|  |  | $ | $ | $ | $ |

**Unit Trusts** *(Please provide the annual statement for all managed funds).*

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| TRUST | TRUST INCOME | TFN CREDITS | IMP. CREDITS | CAPITAL GAINS | FOREIGN INCOME | FOREIGN TAX |
|  | $ | $ | $ | $ | $ | $ |
|  | $ | $ | $ | $ | $ | $ |
|  | $ | $ | $ | $ | $ | $ |

**Investments Sold / Disposed (including Cryptocurrency)**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| COMPANY / TRUST | DATE SOLD | NO. SOLD | AMOUNT RECEIVED | DATE PURCHASED | NUMBER PURCHASED | AMOUNT PAID |
|  |  |  | $ |  |  | $ |
|  |  |  | $ |  |  | $ |
|  |  |  | $ |  |  | $ |
|  |  |  | $ |  |  | $ |

**Cryptocurrency**

|  |  |  |
| --- | --- | --- |
| Do you have **ANY** cryptocurrency transactions during the year? | Y  N | *If yes, please provide an annual tax report or we can do this for you (Note: additional fees apply for this report).*  *Note: We will also need to know your interest expense if you borrowed money to buy crypto* |

**Employee Share Schemes (ESS)** (*Please provide your Annual Tax Statement).*

**Superannuation Contributions** *(Please list your total Personal (NOT Employer) Superannuation contributions & provide a copy of your Notice of Intent to Claim (NOI) Acknowledgment from your superannuation fund).*

|  |  |  |  |
| --- | --- | --- | --- |
| SUPER FUND NAME |  |  | TOTAL AMOUNT |
|  | | | $ |

**Your family home.**

|  |  |  |
| --- | --- | --- |
| Did you sell your family home? | Y  N | *We will be in contact with further questions.*  *Most of the time, there is nothing needed other than a disclosure in your return.* |
| Did you ever earn an income from the home? | Y  N | *We will be in contact with further questions.*  *Most of the time, there is nothing needed other than a disclosure in your return.* |

**MOTOR VEHICLE INFORMATION**

**Vehicle & Logbook**

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **LOGBOOK KEPT** | Y  N | | | **PERIOD COVERED BY**  **LOGBOOK**  *(within last 5 financial years)* | |  | |
| **VEHICLE PLATE NO.** |  | | | | **MAKE & MODEL** |  | |
| **OWNER OF VEHICLE** |  | | | | **DRIVE OF VEHICLE:** | AUTOMATIC  MANUAL | |
| **TOTAL KMs TRAVELLED IN YEAR** | | |  | | **BUSINESS KMs IN LOGBOOK PERIOD** | |  |
| **DATE PURCHASED** |  | | | | **PURCHASE PRICE** | $ | |
| **HOW WAS VEHICLE FINANCED?** | | | Novated Lease  Paid Cash  Chattel Mortgage  Hire Purchase | | | | |
| **DATE SOLD** *(if in this tax year)* | | $ | | | **SALE PRICE** | $ | |

**Running Costs**

|  |  |  |
| --- | --- | --- |
| COST TYPE | ANNUAL AMOUNT (inc. GST) | MONTHLY PAYMENTS |
| Fuel / Oil | $ | *Please provide a copy of your Hire Purchase / Lease / Chattel Mortgage Agreement when you reach the end of the form if we do not already have this on file.*  *Please provide your invoices/receipts* |
| Registration | $ |
| Insurance | $ |
| Repairs & Maintenance | $ |
| Lease Payments | $ | $ |
| Hire Purchase / Chattel Mortgage Payments | $ | $ |
| Interest Paid | $ | $ |
| Services | $ | $ |
| Tyres / Battery | $ | $ |
| Membership Fees | $ | $ |
| Parking & Tolls | $ | $ |

**RENTAL PROPERTY INFORMATION** *Please complete one of these schedules per Property.*

**Property Details**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **ADDRESS OF RENTAL PROPERTY** | |  | | | |
| **DATE PURCHASED** |  | | **DATE RENTAL INCOME FIRST EARNT** | |  |
| **NO. WEEKS AVAILABLE FOR RENT** *(this year)* | | |  | **DATE BUILT** |  |
| **OWNERSHIP DETAILS** | | In your name  In joint names *(please provide details)* | | | |
| **IS THIS PROPERTY LEASED AT MARKET RENT?** | | Y  N *(please provide details of who this is leased to)* | | | |

*For new clients please provide the purchase settlement statement and other purchase costs, e.g., stamp duty, legal fees, renovations or initial repairs, and any loan application fees and/or mortgage discharge expenses when you reach the end of the form.*

*Please also provide your mortgage statements.*

**Income**

|  |  |
| --- | --- |
| GROSS RENT | OTHER RENTAL INCOME |
| $ | $ |

**Expenses**

|  |  |  |  |
| --- | --- | --- | --- |
| EXPENSE TYPE | AMOUNT | EXPENSE TYPE | AMOUNT |
| Advertising for Tenants | $ | Stationery, Phone & Postage | $ |
| Borrowing Expenses | $ | Cleaning | $ |
| Council Rates | $ | Gardening / Lawn Mowing | $ |
| Insurance | $ | Interest on Loan # 1 | $ |
| Land Tax | $ | Interest on Loan # 2 | $ |
| Pest Control | $ | Legal Fees | $ |
| Repairs & Maintenance | $ | Property Management Fees | $ |
| Body Corporate Fees | $ | Agents’ Commissions | $ |
| Water Charges | $ | Other Expenses | $ |

**Depreciable Items\*** *(please Iist any item(s) purchased costing more than $300 individually).*

| ITEM | DATE PURCHASED | COST |
| --- | --- | --- |
|  |  | $ |
|  |  | $ |
|  |  | $ |
|  |  | $ |
|  |  | $ |
|  |  | $ |
|  |  | $ |

**Improvements / Construction Costs** *(Please provide a copy of your tax depreciation schedule if we do not have one on file)*

| ITEM | DATE | COST |
| --- | --- | --- |
|  |  | $ |
|  |  | $ |
|  |  | $ |
|  |  | $ |
|  |  | $ |
|  |  | $ |
|  |  | $ |
|  |  | $ |

|  |
| --- |
| **OTHER INFORMATION** *(Please list any other information that you believe may assist us preparing your income tax return)* |
|  |
|  |
|  |
|  |
|  |

**SUPPORTING DOCUMENT CHECKLIST**

£ Income Statement from your myGov Account / Payment Summaries

£ Detailed Work Expenses Listing

£ Private Health Statement (Optional)

£ Unit Trust Tax Year Summary

£ New Motor Vehicle Hire Purchase / Lease / Chattel Mortgage Agreement / Interest Amortisation schedule

£ Rental Property Purchase Settlement Statement / Costs (if we do not have these)

£ Rental Property Depreciation Schedule (as prepared by Third Party)

£ Letter noting tax deductibility of Income Protection Premiums

£ Confirmation letter from your superannuation fund noting intent to claim tax deduction for contributions

£ Copy of your last tax return (if you are a new client)

Please complete the Authorisation below as this allows us to contact necessary organisations, (e.g., your bank or insurance company) to obtain information that is required to complete your Financial Statements and/or Tax Return.

**AUTHORISATION (please tick the following boxes if you agree)**

I authorise Canberra Tax Solutions to complete the compilation of Tax Return for myself for the 2025 financial year. I understand that a compilation is limited to the collection, classification and summarisation of financial information supplied by me and does not involve the verification of that information.

I do not require Canberra Tax Solutions to carry out an audit or a review assignment on the information provided.

I authorise Canberra Tax Solutions to obtain whatever information is required from third parties complete the preparation of my Tax Return.

**Schedule A**

**Details of what receipts we need to see and the best way to provide your information.**

We encourage you to provide your information in an electronic format whenever possible.

Records containing confidential data should never be sent to us by email. Please use your Canberra Tax Solutions secure client portal. Please email us to get access. Otherwise, email is a perfectly acceptable way to send your information to us, please **DO NOT EMAIL CONFIDENTIAL INFORMATION.**

Confidential Information includes

* Tax file numbers,
* Identity details like your full name, date of birth, drivers’ licence, passport, or Medicare card number.
* Shareholder Reference Number (SRN) or Holder Identification Number (HIN) on investments or shareholdings.

When you upload documents to your Canberra Tax Solutions Dropbox folder, don't be alarmed when we remove them and save them in our CRM.

We can send you the ATO's Prefiling Report (PFR) which outlines the information that the ATO makes available to us on your behalf. Contact the office and we can upload a copy to our Canberra Tax Solutions Dropbox or via snail mail.

We don't need to see all your receipts so feel free to safely file them at home and send us a summary.

The receipts / details that we do need to see are outlined below:

**Donations:**

We don't need to see the receipts, but we need the ABN for each charity.

Please remember, only donations to charities are deductible, Raffle Tickets, fund raiser dinners, and similar items are not donations.

**Rental Properties:**

Repairs and Maintenance greater than $300. We need to see the actual receipt to see what was purchased, and the date that it was purchased.

Ask us for our rental work paper (in paper or Excel) so you can summarise your rental property details.

**Superannuation Contributions:**

To claim a personal superannuation contribution, you must lodge a 'Notice if Intent to Claim' (NOI) with your superannuation fund. We don't need the document - but we like it (please remember that it includes your TFN so do not email it to us).

What we must have as part of our Work Papers is the Acknowledgement of the NOI sent to you by the Super Fund.

**Buying or Selling a Rental Property**:

There is a fair bit we need in either scenario. Let us know and we will contact you about what we need.

For the purchase of your property, we will need the Settlement Statement from your conveyancing solicitor. We will need the first page of the sales contract. We need the legal fees and stamp duty (if the property is in the ACT or NT, this will be a tax deduction but otherwise it's good to capture now for your CGT records).

If you sold the property, we would need details of the original purchase of the property including the settlement statement. We may also need the Stamp Duty and original legal fees on purchase.

Ask us for our CGT checklist on the sale of a rental property.

**Shares and Other Investments:**

We want your Annual Tax Statement for any managed funds. The ATO gives a summary in the PFR, but it is often wrong or incomplete - and most often not in your favour to rely on this information. Please remember that the SRN or HIN on this document is confidential and should not be emailed.

When it comes to dividends from your shares, if the Share Registry has your TFN, the information will be included in your PFR. They usually advise if they have your TFN on your dividend statement. If they don't have your TFN, we encourage you to investigate how to securely advise your TFN to the share registry to help you and us in the future,

If we have your SRN or HIN on file, we have it to investigate corporate events like mergers and rights issues effecting your tax return each year.

When you sell your shares, you will need to give us the original purchase details. Your SRN or HIN will also help us to identify any corporate events effecting your CGT.

**Crypto holdings:**

We need your air drops, changes of wallets, and sales. We need the purchase details, which may have been in a prior year. We encourage you to obtain a Koinly or similar tax statement at the end of each year.

**Income Protection Insurance:**

When you have a deduction to claim for an income protection insurance policy, we need the annual statement regarding the policy as sometimes not all the premiums are tax deductible.

**Private Hospital Insurance:**

Most private health insurers do not provide annual statements anymore, but that's ok as we have the information on your PFR. What we do need to know is who is covered by the policy.

We remind you that it is your responsibility to provide us with accurate financial information and to retain documentation to substantiate any deduction claimed. We will not take responsibility for any failure on your behalf to maintain adequate records. We will prepare your income tax return from the information you have supplied to us and by signing the electronic declaration for lodgement (including via your Canberra Tax Solutions Dropbox) with the ATO, you are agreeing that the information is complete, accurate and free from any material omissions.

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