



# Individual Tax Return Information Form

**Type of client \***

- New
- Existing
- Existing client but details need updating( Visa, TFN, ABN etc)

## Agile Tax Accountants 2024 Tax Client Details Form

**Title**

**Name \***

First Name      Last Name

**Middle Name**

Middle Name

**Date of Birth (please click the calender to pick the date) \***

Day      Month      Year

**Sex \***

Male

Female

**Are you Permanent or Australian Citizen? \***

Yes

No

**If no, what's your current Visa**

**Has your name/address changed since your last lodged return?(Only for existing client)**

Yes

No

**Address \***

Street Address

Street Address Line 2

City/Suburb

State

Postcode

**Email \***

example@example.com

**Mobile Phone Number**

**Postal Address**

Same as above

Other

**Tax File Number \***

**Work Status**

Please Select

**Occupation/Job Title \***

**Are you self-employed/sub-contractor/work under your own A.B.N? \***

Yes

No

**A.B.N? \***

**Is this A.B.N. registered for GST/PAYG Withholding? If yes, please give details**

**Bank Details (The ATO only issue refunds electronically, so you must provide these.) \***

BSB

**Account Number \***

Account Number

**Name of Account \***

Name as it appears on the Account

**Spouse \***

Yes

No

**Spouse Name**

**Spouse D.O.B.**

Month Day Year

**Spouse's Taxable Income (\$)**

**Dependents \***

Yes

No

**Names and D.O.B.'s of all Dependent Children**

Name

DOB

Child 2

Child 3

Child 4

Child 5

**Agile Tax Accountants 2024 Client Income & Expenses form**

**Did you work in employment during 2023/24? \***

Yes

No

**How many jobs did you work in? (You need to obtain a Payment Summary for each job)**

- 1
- 2
- 3
- 4
- more than 5

**For any item you tick "Yes" to - you need to provide documentation to verify it. These can be copies or photo's of documents, providing they're legible and the original accessible if needed.**

App "CamScanner" is very good.

**Were you paid any special payments from any employers? ETP, Labour Hire, Employee Share Schemes? If Yes, provide a statement. \***

Yes  No

**Did you ever travel in 2023/24 that you were paid an allowance for by your employer? If yes, I need days travelled and to where. \***

Yes  No

**Type a question**

	<b>Name of Place</b>	<b>Days</b>
<b>Location 1</b>		
<b>Location 2</b>		
<b>Location 3</b>		
<b>Location 4</b>		
<b>Location 5</b>		

**Did you receive any government payments or allowances or pensions? (Youth Allowance; Newstart) If yes, I need the statement. \***

Yes

No

**How much bank interest did you earn?**

**Bank Name**

**Bank Number**

**Bank Interest**

Bank 1

Bank 2

Bank 3

Bank 4

Bank 5

**Were you paid any share dividends including DRP's?**

**Did you sell any units of shares in 2023/24 ? If yes please provide both Buy & sell details including dates. If yes please provide both Buy & sell details including dates.**

Yes

No

**Did you receive any Managed Fund Distributions from Trusts? If yes tax statement needed. \***

Yes

No

**Did you receive a Trust or Partnership distribution from a related trust or a partnership you have equity in? If yes, I will need full distribution details including financial reports and tax returns of the external trust/partnership. \***

Yes

No

**Do you have an ABN where you have earned income from a sole-trader or Subbie? about this. If yes, how much income earned (Gross/Turnover), but I will need to talk to you further about this. \***

Yes

No

**Income earned (Gross/Turnover)**

**Do you ever use your car for work? This is travelling to non private places during work hours OR do you need your car to carry tools and/or bulky equipment? If yes, you may be able to claim car kms. What's the car's Make, Model & Rego Number. How many KMS would you travel? \***

Yes

No

**Type a question**

Make

Model

Rego Number

KMS

Car 1

Car 2

Car 3

**Did you spend any money on Dry-cleaning and/or Protective Clothing (winter jackets, gloves, even sunglasses) or Specific Clothing (Sports shoes, Chef Pants)? If yes, list items & their cost. \***

Yes

No



**Type a question**

Dry-cleaning or Protective Clothing

Cost

item 1

item 2

item 3

item 4

item 5

**Did you study during the year that directly related to your job? If yes, provide details - Course name, location, days traveled, cost. \***

Yes

No

**Type a question**

Course Name

Location

Days Traveled

Cost

School 1

School 2

School 3

School 4

School 5

List what expenses you had for the year and how much your cost is. We will then discuss everything with you. E.g. Internet Costs; Union fees; Subscriptions; Office & Computer Costs; Software, iPads. Professional Development.

Cost of completing your tax Last year.

Any extraordinary expenditure like income protection.

Do you have any statement not mentioned above?

Yes

No

Occupation/Job Title \*