



Personal Income Tax Return – Year-End Questionnaire

Client:

Date:

To assist us in preparing your income tax return, please use this questionnaire as a checklist when you compile your information.

With respect to your income, please keep in mind that the Australian Taxation Office has the ability to check your return income against independent sources.

For deductions, keep in mind that self-assessment applies. In the event of a Tax Office audit, you will need to be able to substantiate the deductions claimed.

Finally, if you have sold any assets during the year, please provide full details so we can determine whether Capital Gains Tax may apply to the transaction.

Thank you for completing this questionnaire. Completing it takes time and effort, but it will enable us to process your work quickly and efficiently because we will have all the necessary information at hand to complete the work. This will also ultimately save you money and time because we won't need to come back to you with further requests for information, thus delaying the processing of your return.

Please ensure you attach all relevant documentation to the questionnaire, then sign and date this form below and return your questionnaire and documentation to us.

If you have any queries or concerns, please do not hesitate to contact us.

1SBS Taxation Services

I hereby instruct you to prepare my income tax return for the financial year ended 30 June _____.

I undertake to supply all information necessary to carry out such services and will be responsible for the accuracy and completeness of such information.

You are hereby authorised to communicate with my bankers, solicitors, finance companies and all government agencies, such as the ATO to obtain any information you require to enable you to carry out the above assignment.

Name:

Signature:

Date:



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Spouse's Tax File No.:	
Spouse's Taxable Income:	

To ensure that our records are up to date, please assist us by confirming and/or completing the following:

Full name:			
Home address:			
TFN:			
ABN:			
Main Business Activity:			
Address of Business:			
Telephone:	Home	Business	
	Fax	Mobile	
Email address: <i>(For our records only)</i>			
Your occupation:			
Date of birth:			
Spouse's name:			
Spouse's date of birth:			
Period that you had a spouse during the year:	to		
Please list names and dates of birth of children	Name	Date of birth	Dependent children?
			Y <input type="checkbox"/> N <input type="checkbox"/>
			Y <input type="checkbox"/> N <input type="checkbox"/>
			Y <input type="checkbox"/> N <input type="checkbox"/>
			Y <input type="checkbox"/> N <input type="checkbox"/>
Medicare Number:			
Bank and Branch:			
Account name:			
BSB number:		Account number:	
The ATO now require tax refunds to be received via electronic funds transfer.			



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1.	If we are preparing your return for the first time:	Yes	No	?
Please provide:				
1.1	A copy of your last income tax return, income tax assessment and PAYG instalment notices.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1.2	Copies of any other correspondence with the Tax Office such as objections, penalties, Statement of Account, Garnishee Notice, Final Notice to Lodge.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Income				
2.	Salary and Wages	Yes	No	?
2.1	Have you changed your occupation? <i>If yes, please provide details.</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2.2	Have you received any PAYG Payment Summaries from employment? <i>If yes, please provide copies.</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Work Related Expenses				
24.	Motor Vehicle Expenses	Yes	No	?
24.1	Have you incurred any motor vehicle expenses relating to your work or other income producing activity?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
24.2	Please provide a description of each motor vehicle for which you are claiming expenses.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
24.3	Please advise the income producing activity for which each vehicle was used (<i>e.g. employment, business or rental property inspections</i>). If a vehicle was used in multiple activities, please provide an estimated percentage of use for each separate activity.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
24.4	Do you have a current logbook for any vehicles (i.e. kept for 12 continuous weeks during the past four years)? <i>If yes, please provide the business percentage ascertained from your logbook for each vehicle.</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
24.4.1	If you do not have a current logbook for any vehicles, please provide the number of business kilometres travelled during the year by each vehicle.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<p><i>Note: Business kilometres are kilometres travelled in relation to earning income but exclude travel between home and work even if the trip is made more than once a day. Picking up the mail on the way to work or home cannot be included. The exception to this home to work rule is if your vehicle is required to carry bulky tools or equipment or your home is your base of employment. Please contact us to discuss if you have any queries regarding this claim.</i></p>				



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24.5	If you have a current logbook for any vehicle, please provide the total expenses for fuel and oil, interest, leasing, registration, insurance, repairs and maintenance.			
24.6	If you have a current logbook for any vehicle, please provide the following information to support a claim for vehicle depreciation:			
24.6.1	Date the motor vehicle was purchased.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
24.6.2	Details of purchase costs and additional items excluding GST.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
24.6.3	GST paid.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<p><i>Note: For travel more than 5,000 business kilometres, you are required to keep a logbook. For travel up to 5,000 business kilometres, a cents per kilometre claim at the rate of 72 cents per kilometre can be claimed.</i></p> <p><i>Please contact our office if you would like to know more about making a claim for motor vehicle expenses.</i></p>				
25.	Travel Expenses	Yes	No	?
25.1	Did you undertake travel in relation to your employment?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
25.2	Did you receive a travel allowance?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
25.2.1	If yes, are your claims limited to the reasonable allowance amount?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
25.2.2	Have you maintained written evidence of all travel costs claimed?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
25.2.3	Did you maintain a diary of your travel activities where domestic or overseas travel was for 6 or more nights in a row?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<p><i>Note: The following details are required to be kept: nature of the activity, the date and approximate time when the activity began and how long it lasted, and where the activity took place. If a detailed itinerary was provided this provides an adequate travel diary.</i></p>				
25.3	Please provide the following details in relation to your travel:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
25.3.1	Costs associated with the travel (air fares, transport, accommodation etc.). <i>Please provide the receipts.</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
25.3.2	Details of any person(s) who accompanied you.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
25.3.3	Details regarding the purpose of the travel.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
26.	Work Related Clothing	Yes	No	?
26.1	A claim can be made for the cost of buying, renting, repairing or cleaning the following types of clothing:			
26.1.1	Occupation specific clothing - does your clothing make it easy for the public to recognise your profession? <i>If yes, please provide details of your purchases.</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
26.1.2	Protective clothing - does your clothing protect you from potential injury (e.g. safety boots, gloves)? <i>If yes, please provide details of your purchases.</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
26.2	Do you wear a work uniform?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



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26.2.1	If yes, is the policy that wearing the uniform is compulsory while at work?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
26.2.2	Is your work uniform distinctive to your organisation?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
26.2.3	Are shoes, socks and/or stockings an essential part of this uniform? <i>If yes to both of the above, please provide details of your purchases.</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
26.3	Do you wear a non-compulsory work uniform?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
26.3.1	If yes, has your employer registered the design? <i>Note: shoes, stockings and socks cannot be claimed for a non-compulsory work uniform.</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
27.	Laundry Expenses	Yes	No	?
27.1	If you answered yes to any of the questions in section 26 above, you may be able to claim the cost of laundering your clothes (e.g. washing, drying and ironing work clothes).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Note: The reasonable basis to determine laundry expenses is \$1 per load of washing including drying and ironing. If your total laundry expense claim exceeds \$150 and the claim for your other work expenses exceeds \$300 then you will need to provide written evidence (receipts) of your claim.</i>				
28.	Self-Education Expenses	Yes	No	?
28.1	Did you complete any self-education courses?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
28.1.1	Will this course help you to obtain a formal qualification?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
28.1.2	Is there a direct connection between your self-education and your current work activities?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
28.1.3	If you answered yes to 28.1 and 28.1.2, the expenses that may be claimed include textbooks, stationery, student union fees, travel and depreciation (e.g. computer, home office furniture etc.). Also provide details of travel expenses from university to home.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Note: Payment of HELP, SFSS, Open Learning fees or AUSTUDY loan repayments are not tax deductions.</i>				
29.	Other Work Related Expenses	Yes	No	?
29.1	Have you paid union fees? <i>Please supply details if they are not already detailed on your PAYG Payment Summary.</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
29.2	Have you purchased, insured or repaired equipment used for work related purposes? <i>If yes, please provide additional details such as date, cost and business use percentage. Depreciation may be claimed on the business portion of purchased equipment.</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
29.3	Have you paid for meals when working overtime? <i>Note: You can only claim these expenses if you received an overtime meal allowance.</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
29.4	Have you paid sickness and accident or income protection insurance premiums?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
29.5	Have you incurred work related telephone or internet expenses? <i>If yes, what is the business use percentage and amount?</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
29.6	Have you used your computer and purchased computer software for work related purposes?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



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29.7	Have you purchased books, journals and professional libraries?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
29.8	Have you attended and paid for any professional seminars, courses, conferences or other training?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
29.9	Does the nature of your employment require you to work in an environment that exposes you to sun and ultraviolet radiation?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<p><i>If yes, you may be able to claim the costs of sunscreen lotions, hats and sunglasses. Please provide details of expenses incurred. Remember that you need to consider any private use of the sun protection items when calculating your claim. Where there is private use, you will need to estimate what you spent for work purposes and apportion your claim accordingly.</i></p>				
29.10	Did you work from home during the year? Note that minimal tasks such as occasionally checking email or taking calls while at home will not qualify as working from home, the work must be substantial.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
29.10.1	For the period 1 July 2020 to 30 June 2021, did you incur any additional running expenses? Note additional running expenses can take several forms including an increase in electricity usage; heating/cooling; office supplies; office equipment; etc.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
29.10.2	Do you wish to claim a percentage of use of home office expenses for income producing activities (i.e. heating, cooling, lighting, leasing, repairs or depreciation)? <i>Note that a diary of usage should be kept for a minimum of 4 weeks each year for substantiation requirements.</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
29.10.3	If you wish to claim home office expenses using a fixed rate for the period, please provide the number of hours you have worked from home. 01 Jul 2020 to 30 June 2021 <i>Note that you are required to keep a record of the hours you have worked at home. This could be in the form of timesheets, rosters, a diary or similar document that sets out the hours worked.</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
29.11	Have you paid any subscriptions to professional bodies?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
29.12	Have you paid for any formal education provided by a professional organisation?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
29.13	If you received an allowance as detailed at 3.1 please provide details of any expenditure incurred in relation to this allowance or confirm that the expenditure being claimed is limited to the allowance received.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Other Deductions

30. Dividend and Interest Deductions	Yes	No	?
30.1 Have you incurred any expenses relating to dividends or interest income? <i>The expenses include but are not limited to the following:</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
30.1.1 Account keeping fees.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
30.1.2 Management fees.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
30.1.3 Interest charged on money borrowed to purchase shares or units.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



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31. Gifts or Donations	Yes	No	?
31.1 Have you made any gifts or donations?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
31.1.1 If yes, please provide details of dollar amounts and recipients.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
32. Managing Your Tax Affairs	Yes	No	?
32.1 Have you incurred any expenses relating to preparing and lodging your previous year's tax return?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
32.2 Have you incurred any expenses relating to advice from a registered tax agent?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
32.3 Have you incurred costs of travel in obtaining tax advice?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
32.4 Have you paid any interest to the Australian Taxation Office for late payment of income tax or other taxes?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
32.5 Have you incurred any litigation costs (<i>including court and Administrative Appeals Tribunal fees, solicitor, barrister and other legal costs incurred in managing your tax affairs</i>)?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
34. Personal Superannuation Contributions	Yes	No	?
34.1 Have you made personal contributions to a complying superannuation fund? <i>If yes, please answer the following:</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
34.1.1 What was the total amount of personal superannuation contributions made for the year?			
34.1.2 What is the full name of the fund(s) you contributed to and their respective policy numbers?			
34.1.3 Please supply a copy of the Section 290-170 notice from your superannuation fund acknowledging your intention to claim a tax deduction.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
35. Please provide details of any other expenses you have incurred:			



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47.	Spouse's Income	Yes	No	?
47.1	Please provide details of all income earned by your spouse, including salaries and wages, reportable fringe benefits, reportable superannuation contributions, pensions, business income, rental income etc., and related expenses. We may need to contact you for further information.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Most Overlooked Items				
		Yes	No	?
	Capital works deduction on income producing buildings.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Depreciation of fittings for rental properties.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Income protection insurance.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Business travel diary and parking and tolls.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Donations and gifts to eligible recipients.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Mobile phone and computer used for work.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Borrowing costs for rental property loans.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Self-education expenses including travel between work and study place.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Travel to investment seminars for investors.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<p>Please note below any items that may require further information or explanation. We also value your feedback. Please provide your comments below.</p>				

Thank you for completing this questionnaire.

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