

2017 CLIENT QUESTIONNAIRE

PLEASE READ, COMPLETE & SIGN THIS FORM AND ENCLOSE WITH YOUR RECORDS FOR PREPARATION OF YOUR TAX RETURNS

NAME:

CONTACT DETAILS?

BANK ACCOUNT DETAILS FOR REFUNDS?

PLEASE PROVIDE ALL INFORMATION REQUIRED & MARK AS ENCLOSED		DOCUMENT ENCLOSED	COMMENTS
1	PAYG SUMMARIES/PENSIONS/ALLOWANCES/ETP & TAX FILE NUMBER		
	Please enclose payment summaries for all wage/salary, centrelink, pensions, foreign pensions, lump sums, and superannuation payments income received.		
	Details of any allowances you receive.		
	Details of any income/deductions/expense that is not listed on this form.		
2	INTEREST/DIVIDENDS/MANAGED FUNDS/EMPLOYEE SHARE SCHEME		
	Please enclose copies of bank statements, dividend advices, managed fund tax statement and/or employee share schemes.		
3	CAPITAL GAINS / LOSSES		
	Provide documents relating to the purchase and sale of any shares or other investments.		
4	PRIVATE HEALTH INSURANCE		
	Please provide the annual tax statement from your health provider.		
5	EXPENSES		
	<i>Work related motor vehicle expenses</i>		
	Logbook percentage (provide business kms AND total kms travelled)		
	Figures for: fuel, registration & insurance, repairs & maintenance etc.		
	Motor vehicle purchase and sale details (if used for work purposes)		
	Car model and engine size.		
	<i>Work related travel expenses</i>		
	Details of travel expenses (please convert to AU\$)		
	<i>Uniforms/Protective Clothing/Uniform</i>		
	If you received an allowance from your employer, remember to claim any amounts paid for uniforms/protective clothing.		
	<i>Other Work Related Expenses</i>		
	Provide invoices for any asset purchases used in relation to employment.		
	Provide a list of expenses incurred in relation to your employment (Including: Union, trade or professional association fee; Reference material & professional library; home office expenses; safety expenses; tools and equipment purchased - date and cost; professional development, conferences, and training expenses.).		
	<i>Self Education Expenses</i>		
	If required by your work to complete study, or if any study you currently undertake is directly related to improving your skills in your current occupation provide details of these expenses (fees, books).		
	<i>Interest/Dividend Deductions</i>		
	Provide list of expenses incurred in relation to your investments.		
	For any claims of interest on loans, please provide loan statements.		

PLEASE TURN OVERLEAF FOR FURTHER QUESTIONS.

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PAGE 2

		DOCUMENT ENCLOSED	COMMENTS
	<i>Donations</i>		
	Provide list of charities and amounts of donations paid		
	<i>Tax Agent fees</i>		
	If your last Tax Return was prepared by a Tax Agent.		
	<i>Superannuation</i>		
	Provide the personal super contribution deduction and confirmation		
	letter from your superfund.		
	<i>Other deductions</i>		
	Details of Income Protection Insurance.		
	<i>Spouse Superannuation Contributions</i>		
	Advise of super contributions paid for spouse, account numbers etc.		
	<i>Spouse Taxable Income</i>		
	Please advise your spouse taxable income, name and date of birth.		

NOTES TO THE ACCOUNTANT (ALL OTHER RELEVANT INFORMATION):

[illegible]