



Tax preparation application

Are you an existing client? Yes No

Full name:

Contact phone number (Home): (Work):

(Mobile): Email:

I/We may be contacted (cross out days not suitable): Mon / Tue / Wed / Thu / Fri

Preferred method of contact: Home Work Mobile Email

Bank account details: BSB: A/c no:
(see below)

NEW CLIENTS: Please complete below.

EXISTING CLIENTS: Complete below ONLY if your details have changed.

Address:

Tax file no (refer to last year's Notice of assessment):

Occupation: Date of birth:/...../.....

Husband/Wife name: Date of birth:/...../.....

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- Please provide your BSB and account number details, so that any refund due to you can be deposited into your bank account.
 - When we receive the above information, a member of our accounting team will contact you to either arrange a face-to-face meeting or, if you are mailing in all your details and required attachments, to check specific details over the phone or via email, to ensure that your return is completed efficiently and promptly.
 - If you are using the option of mailing in your details and documents, your tax return will be forwarded to you for signature, with an estimate of your tax refund or the amount payable. All signed documentation needs to be returned to our office for lodgement with the Australian Taxation Office (ATO) and assessment.
 - As we have been authorised by the ATO to lodge returns electronically, your refund should be sent out within 14 days of lodgement.

Don't forget to attach your PAYG statement to this form.

Please complete this form and return it using one of the options over the page.



Individual taxation checklist

In order to facilitate the timely completion of your tax return, we ask that details of the following items be provided for the financial year:

Tick (✓) if applicable

Income

- Gross salary, wages & any other income. **PLEASE ATTACH GROUP CERTIFICATES & PAYG PAYMENT SUMMARIES**
- Allowances, benefits, earnings, tips and director's fees
- Dividends received. Include details of franked dividends, imputation credits and re-invested dividends. **PLEASE ATTACH DIVIDEND STATEMENTS**
- Interest received from bank and term deposit accounts
- Government Centrelink payments, including: pensions; unemployment & sickness benefits; and parenting allowance. **PLEASE ATTACH STATEMENT**
- Primary producers, artists, writers, composers, performers, production associates, investors and sports persons should detail separately income earned from such activities.
- Lump sum and termination payments received. Provide all documentation, including Statement of Termination Payment from employer, super fund or approved deposit fund.
- Superannuation pension or Annuity information/PAYG summary. **PLEASE ATTACH**
- Details of shares sold, including: purchase date; costs of acquisition and dividend reinvestment amounts.
- Details of property sold, including: purchase date, costs of acquisition and major improvements.
- Income from trusts, partnerships and managed funds (attach a copy of the annual tax statement).
- Rental property income.
- Business income.
- Cashed life insurance bonuses, where the policy was held for less than 10 years
- Foreign source (employment & pension) income and details of any foreign tax credit attached to that income.

Tick (✓) if applicable

Deductions

- Investment & rental property expenses. Carefully detail any interest claims.
- Union fees and subscriptions.
- Work-related expenses, including purchase and laundry of protective clothing and compulsory uniforms (remember substantiation requirements).
- Computer expenses.
- Cost of ongoing education/training where it is associated with your employment.
- Work-related assets purchased, including purchase date and cost.
- Donations to registered charities & community groups over \$2.
- Superannuation Pension or Annuity undeducted purchase price.
- Non-employer sponsored superannuation contributions.
- Income protection insurance.
- Life/trauma/total & permanent disability insurance.
- Work-related motor vehicle expenses - kms travelled or actual expenses if a log book has been kept.
- Tax preparation & financial advising costs.

Tick (✓) if applicable

Other information

- Family Tax Benefit Statement
- Private health insurance annual statement. **PLEASE ATTACH**
- Net medical expenses for all family members above \$2,162.
- Superannuation contributions on behalf of your spouse.
- Child education expenses
- Child Care Rebate
- Names and dates of birth of children

Remember, if you have ticked any of the boxes on this page, please provide the relevant information.

Please complete this form and return it using one of these options:

Bring it to your appointment or deliver to:
Phillipsons Accounting Services Pty Ltd
388 Raymond Street
Sale

Post:
Phillipsons Accounting Services Pty Ltd
PO Box 859
Sale Vic. 3853

Website:
Login to upload your information at the secure **Business Centre** area on our website at: www.phillipsons.com.au