

Tax Return Form

& APPOINTMENT OF TAX FOCUS PTY LTD AS TAX AGENT
ABN 30 152 386 895 | TAN: 18181007

1. Are You a New Client Current Client

2. Personal Details

Full Name: _____

Tax File Number: _____ ABN: _____

Date of Birth: _____

Current Address: _____

Mobile Number: _____

Email Address: _____

Are you eligible for Medicare? Yes No

Occupation: _____

Visa Status/Type: _____

Marital Status: _____ No of dependants if any: ____

3. Bank Account (for refunds)

BSB: _____ A/C: _____

Please Tick

I hereby appoint Tax Focus Pty Ltd to act as my tax agent, and deal with the Australian Taxation Office on my behalf.

4. Payment

We'll start working on your tax return as soon as it's paid for.

Please debit my debit / credit card (Visa or MasterCard)

AMOUNT	CREDIT CARD NUMBER	EXPIRY	CSV
\$			

OR

I have transferred \$ _____ as a deposit for the preparation of my tax return to:

Tax Focus Pty Ltd
BSB 032-086
A/C 292-919

PLEASE PUT YOUR SURNAME IN THE DESCRIPTION

5. Signature _____

Date _____

Email to: accountant@taxfocus.com.au

6. Appointment Type

Please Tick

By Phone

In Person

To arrange your meeting or call back with a tax accountant, please phone or email us.

7. Email this form (with your relevant information) to:

accountant@taxfocus.com.au

Questions?

(02) 9416 7600

Office Address

Suite 201, Level 2
9-13 Bronte Road
BONDI JUNCTION NSW 2022

Fees

**Basic Return from \$185
+\$95 Per investment
property
+\$55 Per motor vehicle
schedule
+ \$95 - \$440 For active share
market investors and sole
traders.**

**Extra fee may be charged for
additional work such as
capital gain tax or
depreciating items. Please
contact us for a quote.**

We cannot commence work without a deposit.

*Liability Limited by a scheme
approved under professional
standard legislation*

Please answer all the questions and provide relevant documents or information as required.

Income Checklist

- Wages Y/N , Paid parental leave Y/N , Workers comp Y/N , Insurance payments Y/N
 Allowances, tips, Directors Fees, FBT, etc. (If not included on Payment Summaries) Y/N
 Dividends Y/N – If yes please provide copies of all the relevant dividends statements.
 Employee Share Schemes Y/N – If yes please provide copies of all the relevant ESS statement.
 Income from Partnerships or Trusts (e.g. Managed Funds) Y/N If yes please provide details.
 Rental Income Y/N Did you run a business as a sole trader at any time during the year? Y/N
 Capital Gain Events – Assets disposal: Did you sell any assets such as shares or real estate Y/N
 Foreign income – Foreign employment, Pensions, Foreign assets disposal. Y/N During the year, did you own or have an interest in, assets located outside Australia which had a total value of AUD \$50,000 or more Y/N
 Did you earn interest from savings over \$1 Y/N If yes please provide a summary of interest earned.
 Any other income not listed above Y/N

Note: If you are a new client, it would be best if you could provide us with a copy of your previous financial year tax return.

Private Health Insurance

Were you covered by a Private Hospital Insurance (appropriate level of cover) for the entire financial year? Y/N

If you have a spouse or de facto partner and we do not prepare his/her tax return please provide the following details:

First Name: _____ Surname: _____ D.O.B: _____

Taxable income	\$ _____	Net investment & rental property loss	\$ _____
Reportable fringe benefits	\$ _____	Taxable government pensions & allowances	\$ _____
Reportable super contributions	\$ _____	Exempt government pension	\$ _____
Net foreign income	\$ _____	Military rehab. pension not included elsewhere	\$ _____
Superannuation lump sum received	\$ _____	Child support your spouse paid	\$ _____

Common work-related deductions summary:

Work from Home – Total number of hours worked from home during the relevant Financial Year: hours

Work related Mobile Phone and Internet Usage - Details of payment and percentage used for work:

Mobile Phone: Total cost during the relevant Financial Year: \$, and work-related percentage %

Internet: Total cost during the relevant Financial Year: \$, and work-related percentage %

Please advise our team if you incurred work related car related expenses and if you have a relevant logbook.

Please provide copies of relevant receipts or a summary of the expenses for any work-related expenses such as:

Seminars, Conferences and Workshops; Union or professional membership fee; Protective or compulsory uniforms or equipment; Work related travel expense; Work related self-education expense; Stationaries and home office expenses; Computer and software; Periodicals and books; Any other relevant work-related expense.

If you made a *Personal Super Contribution* – Please provide a copy of the Notice of Intent to Claim a tax deduction.

Income protection insurance (outside the superannuation) – Please provide a copy of the year end statement.

Gifts and Donations – Please provide summary of donations made to organisations that have DGR status (Deductible Gift Recipients) - must have a tax invoice for each relevant donation.

Cost of managing tax affairs to third party accountants – Please provide copy of receipt or advise the total paid.