

TAX QUESTIONNAIRE 2015

Individual Income Tax Return - Preparation by Correspondence

Please complete the following checklist and return along with a **copy** of your PAYG Payment Summary(ies) and any other information as requested. **Please provide only copies of your documentation** as we will not return paperwork and we do not accept responsibility for original documentation being lost or destroyed.

As previously advised, returns will not be lodged until payment for services is made or an arrangement has been communicated.

Please email, fax or post this form back to our office.

Email: info@accrueaccounting.com.au

Fax: (03) 8371 0001

Post: Suite 9 5 Everage St Moonee Ponds 3039

Personal Details

Name: _____

Address: _____

Phone (B/H): _____ Mobile: _____

Email: _____ Date of Birth: _____

NOW COMPULSARY TO PROVIDE FINANCIAL INSTITUTION ACCOUNT DETAILS TO HAVE YOUR TAX REFUNDS DEPOSITED INTO YOUR ACCOUNT.

The ATO no longer issues cheque refunds. If your financial institution details are not provided it will result in delayed processing of your tax return.

Bank Details:

Bank Name _____ BSB No _____

Account Name _____ Account No _____

Spouse details

Name _____ Date of Birth _____

Taxable income \$ _____

Income

Please indicate by circling, yes or no if you have received any of the following sources of income:

Salary & Wages If yes, include PAYG Payment Summary(ies).	Yes	No
Occupation Description _____		
Centrelink Payments – Newstart Allowance, Age Pension etc <i>*Please note: No documentation required.</i>	Yes	No
Termination Payments (including Superannuation Lump Sums) If yes, include PAYG Payment Summary and statement of termination.	Yes	No
Annuities / Superannuation Pension If yes, include PAYG Payment Summary and other relevant documentation.	Yes	No
Interest Institution: _____ Amount _____ Institution: _____ Amount _____ Where you have multiple accounts please provide a summary, including joint accounts.	Yes	No
Investments / Managed Funds If yes, include tax summary	Yes	No
Dividends If yes, provide dividend statements	Yes	No
Rental Property If yes, provide all relevant documents	Yes	No
Other Income / Capital Gains If yes, provide brief description and documentation. Please note: Shares held in a company that has been take over or merged may be subject to capital gains tax	Yes	No

Deductions

Travel / Motor Vehicle Expenses If you travel more 5,000 kms for work purposes throughout the year, you should use a logbook to maximise your claim If yes, please advise: 1 Work related kms _____ 2 Engine capacity _____	Yes	No
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Protective Clothing / Uniform	Yes	No	\$ _____
Self Education Expenses	Yes	No	\$ _____
Work Related Subscriptions / Journals	Yes	No	\$ _____
Gifts / Donations	Yes	No	\$ _____
Tax Agent fees	Yes	No	\$ _____
New Equipment Date Purchased: _____ Cost: _____ Description: _____	Yes	No	\$ _____
Other expenses not listed above (Attach separate sheet if necessary)			
Description: _____ Amount: \$ _____		Yes	No
Description: _____ Amount: \$ _____			

Tax Offsets

Please indicate if you believe you are entitled to any of the following rebates. We will then contact you and determine your entitlement

Medical Expenses Offset This is no longer allowed as an offset by the ATO, unless it relates to permanent incapacity.	Yes	No
Health Insurance Offset *It is essential to provide a copy of your Annual Private Health Insurance Statement. If your Annual Private Health Insurance Statement is not provided it will result in delayed processing of your tax return.	Yes	No

Substantiation

Please note - In accordance with the Tax Office's substantiation guidelines if your work related deductions exceed \$300 receipts must be retained for 5 years to validate those claims.

You can improve your record keeping by utilising the new **Sage Point & Claim free app**. It will help you save time sorting and looking for lost receipts. Point & Claim is a free receipt management app that not only saves you time and money, but also creates ATO compliant records.