

TAX QUESTIONNAIRE 2019

Individual Income Tax Return - Preparation by Correspondence

Please complete the following checklist and return along with 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.

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

Email: gayle@accrueaccounting.com.au

Fax: (03) 8371 0099

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 You no longer need to provide a copy of your PAYG Summary	Yes	No
Occupation Description _____		
Centrelink Payments – Newstart Allowance, Age Pension etc You no longer need to provide a copy	Yes	No
Termination Payments (including Superannuation Lump Sums) You no longer need to provide a copy	Yes	No
Annuities / Superannuation Pension You no longer need to provide a copy	Yes	No
Interest Institution: _____ Amount _____ Institution: _____ Amount _____ <i><u>Where you have multiple accounts please provide a summary, including joint accounts.</u></i>	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 <i><u>It may assist you to use our rental property checklist on our website</u></i>	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 Have you used your motor vehicle to travel for work purposes? If yes, please advise: Estimated Work related kms travelled year _____	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: \$ _____ Description: _____ Amount: \$ _____	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. It has been well publicised that the ATO are taking a harder line on claims for work related expenses. We can confirm that this has been our experience also in the past 2 years. **If you are uncertain of claims please raise the issue for us to consider & provide our opinion.**