

# TAX QUESTIONNAIRE 2021

## Individual Income Tax Return - Preparation by Correspondence

Please complete the following checklist and return along with a copy of any other information 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

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### Personal Details

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Phone (B/H): \_\_\_\_\_ Mobile: \_\_\_\_\_

Email: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

**NOW COMPULSORY 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:

|   |     |    |
|---|-----|----|
| <b>Salary &amp; Wages</b><br><b><u>*We no longer require your PAYG summary</u></b>  | Yes | No |
| <b>Occupation</b><br><b>Description</b> _____<br><b>Please advise if you have changed occupation since last tax return</b>  |     |    |
| <b>Centrelink Payments – Newstart Allowance, JobSeeker, Age Pension etc</b><br><b><u>*Please note: No documentation required.</u></b>   | Yes | No |
| <b>Termination Payments (including Superannuation Lump Sums)</b><br>If yes, please provide documentation from Employer / Fund   | Yes | No |
| <b>Annuities / Superannuation Pension</b><br>If yes, please provide documentation from the Fund   | Yes | No |
| <b>Interest</b><br>The ATO provides us with this information  | Yes | No |
| <b>Investments / Managed Funds</b><br>The ATO provides us with this information   | Yes | No |
| <b>Dividends</b><br>The ATO provides us with this information   | Yes | No |
| <b>Rental Property</b><br>If yes, provide all relevant documents<br>It may assist you to use our rental property checklist on our website or call us to request a checklist   | Yes | No |
| <b>Other Income / Capital Gains</b><br>If yes, provide brief description and documentation.<br><b>Please note:</b> Shares held in a company that has been taken over or merged may be subject to capital gains tax. Contact us if you are unsure whether a transaction is a taxable capital gain. | Yes | No |

## Deductions

|   |     |    |
|---|-----|----|
| <p><b>Travel / Motor Vehicle Expenses</b><br/>         If you travel more 5,000 kms for work purposes throughout the year, you should use a logbook to maximise your claim<br/> <b>If yes, please advise:</b><br/>         1 Work related kms _____<br/>         2 Engine capacity _____</p> <p>For client's using a log book to determine their work related %. There are now various apps you can use, instead of manual recording. Contact us for details.</p> | Yes | No |
|---|-----|----|

|   |     |     |          |
|---|-----|-----|----------|
| <b>Protective Clothing / Uniform</b>  | Yes | No  | \$ _____ |
| <b>Self Education Expenses</b>  | Yes | No  | \$ _____ |
| <b>Work Related Subscriptions / Journals</b>  | Yes | No  | \$ _____ |
| <b>Home Office Expenses (refer to additional information on following page)</b>                       | Yes | No  | \$ _____ |
| <b>Gifts / Donations</b>  | Yes | No  | \$ _____ |
| <b>Tax Agent fees</b>   | Yes | No  | \$ _____ |
| <p><b>New Equipment</b></p> <p>Date Purchased: _____</p> <p>Cost: _____</p> <p>Description: _____</p> | Yes | No  | \$ _____ |
| <b>Other expenses not listed above (Attach separate sheet if necessary)</b>                           |     |     |          |
| Description: _____ Amount: \$ _____   |     | Yes | No       |
| Description: _____ Amount: \$ _____   |     |     |          |

**Private Hospital Insurance (PHI) – The ATO now provides us with this information, you do not need to send your annual tax statement from your Health Fund.**

## **Working from home due to Covid-19 ? What you can claim**

If you have incurred work-related expenses and you have not been reimbursed by your employer, you can claim these expenses at a rate of 80 cents for each hour you work. To use this method, you will need a record of the hours you have worked, such as a diary or timesheet.

The claim covers all of your additional running expenses such as:

- Electricity and gas
- Decline in value and repair of capital items such as office furniture
- Cleaning expenses
- Phone and internet expenses
- Stationery
- Decline in value of computers and devices

For example, if you worked from home for 7 hours a day on the weekdays between 1 July 2020 and 30 June 2021, that's 240 working days or 1,680 hours. Using the 80 cents COVID-hourly rate, you could claim \$1,344.00. The rate covers all of your expenses and you cannot claim individual items separately, such as office furniture or a computer.

The COVID-hourly rate can be claimed per individual (it is not limited by household). That is, if you have multiple people working from home in your household, each person can claim the 80 cents per hour rate for the hours they have worked from home.

Using the COVID-hourly rate is optional and aimed at people who do not normally work from home. For some, their expenses will be higher, such as those with a dedicated home office, or for those that normally operate their business from home. In these circumstances the normal rules will apply.

The ATO appears to be taking the view that occupancy costs such as mortgage interest payments and rent cannot generally be claimed by those who are temporarily working from home as a result of COVID-19.

## **Superannuation Contributions (Personal)**

Have you made personal contributions (other than through your employer during the year)? If so you may be eligible to claim a tax deduction for them. If you are claiming a tax deduction you need to advise the fund that you are by completing the appropriate form (Notice of intention to claim personal super contributions), it is available on our website, or we can send you a copy.