

TAX QUESTIONNAIRE 2016

Individual Income Tax Return Checklist

Please complete the following checklist and return along with your PAYG Payment Summary (ies) and any other requested information in electronic format (.pdf preferred). We will not return to you original documents unless previously agreed. Please refer to our website at www.andersonharrop.com.au for Fees & Charges. As previously advised, returns will not be lodged until payment for services is made or arranged for.

Personal Details

Name : _____

Address: _____

Phone Business Hours (or mobile) _____ Email _____

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).	
Occupation	
Age Pension / Other Centrelink Payments If yes, include documentation	
Termination Payments (including Superannuation Lump Sums) If yes, include PAYG Payment Summary and statement of termination.	
Annuities / Superannuation Pension If yes, include PAYG Payment Summary and other relevant documentation.	
Interest Institution: _____ Amount _____ Institution: _____ Amount _____ Where you have multiple accounts please provide a summary, including joint accounts.	
Investments / Managed Funds If yes, include tax summary	
Dividends If yes, provide dividend statements	
Rental Property If yes, provide all relevant documents	

<p>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</p>	
<p>Deductions</p>	
<p>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 _____</p>	
<p>Protective Clothing / Uniform</p>	
<p>Self Education Expenses</p>	
<p>Work Related Subscriptions / Journals</p>	
<p>Gifts / Donations</p>	
<p>Tax Agent fees</p>	
<p>New Equipment Date Purchased: _____ Cost: _____ Description: _____</p>	
<p>Other expenses not listed above (Attach separate sheet if necessary) Description: _____ Amount: \$ _____</p>	
<p>Medical Expenses Offset (where expenses exceed \$2,162 and you have previously claimed this offset)</p>	
<p>Health Insurance Offset (Please send us your premium statement and refer to https://www.ato.gov.au/Individuals/Medicare-levy/In-detail/Medicare-levy-surcharge/Private-health-insurance-rebate-and-Medicare-levy-surcharge/ for eligibility)</p>	

Substantiation

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

Superannuation & Personal Insurances

Please remember to bring an up-to-date superannuation statement from your current super fund as well as details of any insurance cover you hold (life insurance, tpd insurance, income protection insurance)

Mortgage Details

Please remember to bring an up-to-date loan statement so that we can assess you current mortgage for interest rate, repayment levels and loan provider.