

Personal Income Tax Return – Year End Questionnaire 2010

To assist us in preparing your income tax return, please use this questionnaire as a checklist when you compile your information.

With respect to your income, please keep in mind that the Australian Taxation Office has the ability to check your return income against independent sources. In particular, this applies to PAYG Payment Summary income, interest received and dividends.

For deductions, keep in mind that self-assessment applies. In the event of a Tax Office audit you will need to be able to substantiate the deductions claimed.

Finally, if you have sold any assets during the year please provide full details so we can determine whether Capital Gains Tax may apply to the transaction.

Your next steps:

Thank you for completing this questionnaire. Completing it takes considerable time and effort however your efforts will enable us to process your work quickly and efficiently because we will have all the necessary information at hand to complete the work. This will also ultimately save you money and time because we won't need to come back to you with further requests for information, thus delaying the processing of your return.

Please ensure you attach all relevant documentation to the questionnaire, then sign and date this form below and return your questionnaire and documentation to us by:

1. Delivering information to 5 Davidson Terrace, Joondalup WA 6027; or
2. Posting information to PO Box 635, Joondalup WA 6919; or
3. Telephoning our office on 9301 2200 to arrange an appointment at a time convenient to you.

If you have any queries or concerns, please do not hesitate to contact us.

Timing:

Please indicate when you require the accounts to be completed:

- | | |
|---|--------------------------|
| 1. No hurry, just meet Australian Taxation Office (ATO) lodgement deadline? | <input type="checkbox"/> |
| 2. For finance application? Date required: | <input type="checkbox"/> |
| 3. Other (please specify)? Date required: | <input type="checkbox"/> |

I hereby instruct you to prepare my Taxation Return for the financial year ended 30 June 2010.

I undertake to supply all information necessary to carry out such services, and will be responsible for the accuracy and completeness of such information.

You are hereby authorised to communicate with my bankers, solicitors, finance companies and all government agencies such as the ATO to obtain such information as you require to enable you to carry out the above assignment.

Name:

Signature:

Date:

To ensure that our records are up to date, please assist us by confirming and/or completing the following:

Full name: _____

Home address: _____

Telephone: Home Business

Fax Mobile

Email address:
(For our records) _____

Your occupation: _____

Date of birth: _____

Spouse's name: _____

Spouse's date of birth: _____

Spouse's Tax File No.: _____

Spouse's Taxable Income: _____

Please list names and dates of birth of dependant children:

Name	Date of birth
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Do you wish to use electronic funds transfer?*

Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
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**If yes, we will then require the following information*

Bank and Branch:

Account name:

BSB number:

Account number:

Tax refunds can be made via electronic funds transfer. It should be noted that this electronic funds transfer authority can be cancelled for future years.

1. If we are preparing your return for the first time:		Yes	No	?
Please provide:				
1.1	A copy of your last tax return, taxation assessment and PAYG instalment notices.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1.2	Copies of any other correspondence with the Tax Office such as objections, penalties, Statement of Account, Garnishee Notice, Final Notice to Lodge.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Income				
2. Salary and Wages		Yes	No	?
2.1	Have you changed your occupation? <i>If yes, please provide details.</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2.2	Do you have PAYG Payment Summaries from employment?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Allowances, Benefits and Other Salary and Wages Income		Yes	No	?
3.1	Have you received any allowances, benefits and other earnings not on your PAYG Payment Summary? <i>If yes, please provide details.</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Lump Sum Payments		Yes	No	?
4.1	Have you received any lump sum payments? <i>e.g. Pro Rata Annual Leave.</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Employment Termination Payments		Yes	No	?
5.1	Have you any ETP Payment Summary Statements?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. Australian Government Pensions and Allowances		Yes	No	?
6.1	Have you any PAYG Payment Summaries detailing Government pensions, allowances and payments?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. Australian Annuity or Superannuation Pension		Yes	No	?
7.1	Have you received any income from an Australian Annuity or Superannuation Pension? <i>If yes, please provide PAYG Payment Summary statement.</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. Australian Superannuation Lump Sum Payments		Yes	No	?
8.1	Did you receive an Australian Superannuation Lump Sum Payment? <i>If yes, please provide your PAYG Payment Summary.</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9. Other Employment Income		Yes	No	?
9.1	Have you been employed during the year and not received a PAYG Payment Summary?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9.1.1	If yes please attach details of each employer's name, address, telephone number(s), address where work completed (if different to address of the employer), period(s) of employment, Gross Earnings, Allowances, PAYG withheld and Reportable Fringe Benefits amount.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

10. Interest		Yes	No	?
10.1	Have you received or been credited with interest from any source within Australia? If yes, please attach the following information:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10.1.1	Name of the bank or financial institution that paid you the interest.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10.1.2	The account number.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10.1.3	Details of any TFN tax deducted from your interest.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10.2	Details of interest paid or credited to the above accounts.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10.3	Name of the account, (i.e. held in your name only or joint names).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11. Dividends		Yes	No	?
11.1	Have you received or been credited with any dividends from companies in Australia, including dividends reinvested? <i>If yes, please provide dividend advice slips received during the financial year.</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12. Income from a Trust or Partnership		Yes	No	?
12.1	Have you received or are you entitled to receive a distribution of income or loss from a trust or partnership or managed funds.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12.1.1	Statements detailing income distributed from the partnership or trust. <i>If yes, please provide.</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12.1.2	Any deductions you can claim against this income.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
13. Other Business Income		Yes	No	?
13.1	Did you receive business, contract, subcontract, or personal services income.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
13.1.1	If yes, please provide details of income and expenditure relating to your business activity.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
14. Farm Management Deposits		Yes	No	?
14.1	Have you made any deposits or withdrawals to a Farm Management Deposit? <i>If yes, please provide documentation.</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
15. Capital Gains or Losses		Yes	No	?
15.1	Have you sold or disposed of any assets?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Note: The description of assets is very broad and is not limited to the following:</i>				
15.1.1	Shares, options, futures, units, property and foreign assets.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
15.1.2	Artwork, jewellery, rare manuscripts or books, stamps, coins, medallions, antiques.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
15.1.3	Other personal assets that have been sold for more than \$10,000.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
15.1.4	Equipment or plant owned personally.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
15.1.5	Goodwill on the sale of a business (including a share in company, partnership interest etc).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
15.2	If you have sold or disposed of any of the assets above? <i>Please provide the following information for each and/or documentation:</i>			

15.2.1	Identify the asset.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
15.2.2	Date of purchase (<i>date the contract was signed</i>).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
15.2.3	Cost of purchase (purchase price, legal expenses, stamp duty etc).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
15.2.4	Details of any additions to that investment (<i>additional costs incurred</i>).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
15.2.5	Date of sale (<i>date the contract was signed</i>).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
15.2.6	Sale details (include costs of sale, legal expenses, advertising etc).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Note: Capital gains tax records must be kept for a period of 5 years from the date of disposal of the asset.</i>				
16.	Foreign Income	Yes	No	?
16.1	Did you receive foreign interest, royalties, dividends, rent or any other foreign income and expenses.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
16.2	Please provide the following information:			
16.2.1	Details of the income and related expenditure, details of any tax credits paid on the foreign income. Is this income deposited in a foreign bank account? Is this income remitted back to you in Australia?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
17.	Rental Income	Yes	No	?
17.1	Have you received rental income or made your property available for rental? <i>If yes, please provide the following information for each rental property:</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
17.1.1	Is the property owned jointly with another party?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
17.1.2	Date the property was first available for rent.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
17.1.3	Rent received during the year, including rent received and held by your agent at 30 June.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
17.1.4	For first year claims – settlement statement, purchase contract including depreciation schedule, advice from vendor regarding historical construction costs, description and cost of all capital expenditure since purchase.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
17.1.5	Details of interest paid on money borrowed to purchase the property.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
17.1.6	Details of all other expenses relating to your rental property.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Note: The following expenses are generally deductible: advertising for tenants, agent's commission and letting fees, rates, repairs and maintenance, insurance, body corporate fees, borrowing expenses, depreciation of furniture and fittings, travelling to inspect the property.</i>				
18.	Bonuses from Life Assurance or Friendly Society Bonds	Yes	No	?
18.1	Have you received a bonus or surrendered, terminated or forfeited a life assurance or friendly society bond? If yes, please provide details of your policy and/or the bonus advice.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
19.	Other Income	Yes	No	?
19.1	Have you received any other income?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
19.2	Were you granted any shares or rights under an employee share scheme? If so please supply the relevant information.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

23. Work Related Clothing		Yes	No	?
23.1	Have you incurred any of the following work related expenses:			
23.1.1	Occupation specific clothing?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
23.1.2	Protective clothing?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
23.1.3	Compulsory uniform?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
23.1.4	No compulsory registered corporate wardrobe?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
23.1.5	Laundry or dry cleaning maintenance for the above?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
24. Self Education Expenses		Yes	No	?
24.1	Did you complete any self-education courses?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
24.1.1	If yes, will this course help you into a new field or help you to obtain a new type of job?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Note: If you answered yes to 24.1.1, you may be able to claim for self-education expenses, depending on the result of a court decision to be handed down later in 2010. Please retain all records of these expenses.</i>				
24.1.2	Will this course help you to obtain a formal qualification?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
24.1.3	Is there a direct connection between your self-education and your current work activities?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
24.1.4	If you answered yes to 24.1 and 24.1.3, the expenses that may be claimed include textbooks, stationery, student union fees, travel and depreciation (e.g. computer, home office furniture etc). Also provide details of travel expenses from university to home.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Note: Payment of HELP, HECS, SFSS, Open Learning fees or AUSTUDY loan repayments are not tax deductions.</i>				
25. Other Work Related Expenses		Yes	No	?
25.1	Have you paid Union Fees or subscriptions to professional bodies?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
25.2	Have you purchased, insured or repaired equipment used for work related purposes?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
25.3	Have you paid for meals when working overtime? <i>Note: You can only claim these expenses if you received an overtime meal allowance.</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
25.4	Have you paid Sickness and Accident or Income Protection Insurance premiums?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
25.5	Have you incurred telephone/mobile phone expenses for work related telephone calls?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
25.6	Do you use your computer, internet and purchased computer software for work related purposes?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
25.7	Have you purchased books, journals and professional libraries?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
25.8	Have you attended and paid for seminars, conferences and other training?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

32. Spouse	Yes	No	?
32.1 Do you have a spouse (married or de facto) without dependant children or students? If so please provide details.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
33. Private Health Insurance	Yes	No	?
33.1 Were you a member of a private health fund(s)?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
33.1.1 If yes, please provide the name of the fund(s), type of cover, membership number and provide a copy of the Private Health Insurance Statement provided by the health fund(s) at the end of the year.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
34. Education Tax Refund			
34.1.1 Did you care for a child or children registered or enrolled in a primary or secondary school course provided at an educational institution such as a school or TAFE (secondary school study only)?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
34.1.2 Did you receive Family Tax Benefit (FTB) Part A for the child or children?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
34.1.3 Did you incur any of the following expenses:			
34.1.4 Laptop computer or home computer?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
34.1.5 Computer related equipment such as printers, USB flash drives, as well as disability aids to assist in the use of computer equipment for students with special needs.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
34.1.6 Computer repairs.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
34.1.7 Home internet connections.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
35.3.5 Computer software for educational use .	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
35.3.6 School text books and other printed learning material including prescribed text books, associated learning materials, study guides and stationery.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
35.3.7 Prescribed trade tools for secondary school trade courses.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
35. Superannuation Contributions On Behalf Of Your Spouse	Yes	No	?
35.1 Have you contributed any superannuation on behalf of your spouse?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
36.1.1 If yes was your spouse's gross income (including reportable fringe benefits) less than \$13,800?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
36. Zone Allowance	Yes	No	?
36.1 Have you lived in a remote or isolated area of Australia ? Please provide town and dates in the area.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
37. Net Medical Expenses	Yes	No	?
37.1 Have you paid medical expenses in excess of \$1500 (after Medicare and private health insurance refunds) for your family including children under 21 and students to 25?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
38. Parent, Spouse's Parent or Invalid Relative	Yes	No	?
38.1 Did you maintain your parent, your spouse's parent or an invalid relative during the year?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

39. Child Housekeeper		Yes	No	?
39.1	Has your child, adopted child or stepchild kept house for you on a full-time basis? <i>You cannot claim this offset for any period you lived with a spouse.</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
40. Medicare Levy Exemptions		Yes	No	?
40.1	Do you have a Medicare levy exemption certificate?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
41. Higher Education Contribution Scheme and Others		Yes	No	?
41.1	Do you have a HECS/HELP debt? <i>If yes, please provide a copy of your HECS/HELP statement.</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
42. Adjusted Tax Free Threshold		Yes	No	?
42.1	Have you become or ceased to be a resident of Australia during this financial year?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
42.1.1	If yes, what date did you become or cease to be a resident of Australia?			
43. Child Support		Yes	No	?
43.1	Did you or your spouse pay child support in 2010? If so what was the amount?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
44. Tax Free Government Pensions		Yes	No	?
44.1	Did you or your spouse receive any tax free government pensions during 2010, if so please provide details.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
45. Personal/Business Lending		Yes	No	?
45.1	Our Finance Broking Division offers a free analysis of your existing borrowings and are experts in ensuring your loans are structured effectively to reduce interest rates, bank fees and the term of your loans.			
45.2	Would you like to have your lending position reviewed?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
46. Financial Planning		Yes	No	?
46.1	What is your tax effective Wealth Creation strategy? Would you like to have your Tax Planning and Wealth Creation strategies reviewed?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
46.2	Would you like us to assess whether your current super and investments will provide you with a secure retirement?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
46.3	Would you like to have your personal insurance reviewed to ensure it is structured tax and cost effectively?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

