

## Personal Income Tax Return - Year End Questionnaire 2017

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.

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 avoid unnecessary costs because we won't need to come back to you with further requests for information, thus delaying the processing of your return.

### Your next steps:

**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. Email by return or alternatively email to [clientcare@mckinleyplowman.com.au](mailto:clientcare@mckinleyplowman.com.au); or
2. Delivering information to 5 Davidson Terrace, Joondalup WA 6027; or
3. Posting information to PO Box 635, Joondalup WA 6919; or
4. Telephone 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"/> |

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*I hereby instruct you to prepare my Taxation Return for the financial year ended 30 June 2017.*

*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:

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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		
	Mobile				
Email address: <i>(For our records only)</i>					
Your occupation:					
Tax File Number:					
Date of birth:					
Spouse's name:					
Spouse's date of birth:					
Period that you had a spouse during the year:		to			
Spouse's Taxable Income					
Please list names and dates of birth of dependant and income	Name	Date of birth	Income		
<i>*It is now a requirement to provide EFT details if you are in a refundable position.</i>					
Bank and Branch*:					
Account name*:					
BSB number*:		Account number*:			
Do you wish to use our Fee From Refund Service (cost of \$27.50 inc GST)?			<table border="1"> <tr> <td style="text-align: center;">Y <input type="checkbox"/></td> <td style="text-align: center;">N <input type="checkbox"/></td> </tr> </table>	Y <input type="checkbox"/>	N <input type="checkbox"/>
Y <input type="checkbox"/>	N <input type="checkbox"/>				

1. INCOME	Yes	No
➤ Did you receive any PAYG Summary Statements for the 2017 financial year?	<input type="checkbox"/>	<input type="checkbox"/>
➤ Did you receive directors' fees, allowances or any other employment related income that is not shown on your PAYG Summary Statements?	<input type="checkbox"/>	<input type="checkbox"/>
➤ Did you receive any lump sum employer payments?	<input type="checkbox"/>	<input type="checkbox"/>
➤ Have you received any Employment Termination Payments (ETP's)?	<input type="checkbox"/>	<input type="checkbox"/>
➤ Have you received any Australian Government pensions, allowance and payments?	<input type="checkbox"/>	<input type="checkbox"/>
➤ Have you received any Australian Superannuation Income Stream or Annuities?	<input type="checkbox"/>	<input type="checkbox"/>
➤ Have you received any Australian Superannuation Income Stream, Lump Sum Superannuation payments or income from Annuities?	<input type="checkbox"/>	<input type="checkbox"/>
➤ Did you receive any interest from Bank accounts?	<input type="checkbox"/>	<input type="checkbox"/>
➤ Did you receive any dividends / distributions from investments?	<input type="checkbox"/>	<input type="checkbox"/>
➤ Did you participate in an employee share scheme during the 2017 financial year?	<input type="checkbox"/>	<input type="checkbox"/>
➤ Have you received or are you entitled to receive a distribution of income / loss from a partnership, trust, managed fund or forestry investment scheme?	<input type="checkbox"/>	<input type="checkbox"/>
➤ Did you acquire or dispose of any investments, which may include real estate, shares, collectables, listed & unlisted securities etc.? [Note - Buy, sell contracts and settlement statements will be required].	<input type="checkbox"/>	<input type="checkbox"/>
➤ Did you carry on a business during the year under an ABN that is registered in your name? If yes, then please complete the 'Business Questionnaire – 2017' in respect of the business.	<input type="checkbox"/>	<input type="checkbox"/>
➤ Do you run a primary production (i.e. farming) business and have made deposits into a Farm Management Deposit account?	<input type="checkbox"/>	<input type="checkbox"/>
➤ Did you receive any income from sources 'Outside of Australia', whether pensions, interest, dividends, rent, employment or other income?	<input type="checkbox"/>	<input type="checkbox"/>
➤ Have you cashed in any life insurance policies during the 2017 financial year?	<input type="checkbox"/>	<input type="checkbox"/>
➤ Have you received rental income or made your property available for rent? <i>*See separate rental property questionnaire</i>	<input type="checkbox"/>	<input type="checkbox"/>
➤ Have you received any other income not covered in the previous questions?	<input type="checkbox"/>	<input type="checkbox"/>

2. DEDUCTION	Yes	No
<p>➤ Have you incurred motor vehicle expenses whilst travelling in the course of your employment? Have you maintained a log book and can provide records of expenses? Alternatively, please provide evidence of kilometres travelled.</p>	<input type="checkbox"/>	<input type="checkbox"/>
<p>➤ Have you purchased a new motor vehicle that you have used for travelling during the course of your employment? Provide dealer invoice and loan contract (if financed) and log book percentage.</p>	<input type="checkbox"/>	<input type="checkbox"/>
<p>➤ Do you undertake travel in relation to your employment? Please provide details of any out of pocket expenses including travel diaries, taxi, airfares, parking, train fares, tolls, accommodation, hire cars, meals (overnight only).</p>	<input type="checkbox"/>	<input type="checkbox"/>
<p>➤ Have you incurred costs in relation to protective clothing, uniforms, occupation specific clothing, compulsory or registered uniforms? If you answered “yes” please provide details of buying, repairing or cleaning these specific clothing items. [You cannot claim the cost of purchasing plain uniforms or clothes, such as black trousers, white shirts or stockings, even if your employer requires you to wear them.]</p>	<input type="checkbox"/>	<input type="checkbox"/>
<p>➤ Did you complete any self-education courses? Will this course help you obtain a formal qualification? Is it in direct connection with your current work activities? If you answered yes to any of those options, the expenses you may be entitled to claim include textbooks, stationery, student union fees, travel and depreciation on computer, home office furniture etc. Also provide travel expenses from university to home.</p>	<input type="checkbox"/>	<input type="checkbox"/>
<p>➤ Have you paid for other work related expenses such as: trade or business tools, journals and / or subscriptions, union fees, sun protection, home office expenses, telephone / mobile phone, internet connection, computer hardware and software purchases, seminars and stationery?</p>	<input type="checkbox"/>	<input type="checkbox"/>
<p>➤ Have you incurred any expenses relating to dividends or interest income? The expenses include but are not limited to: Account keeping, management fees &amp; interest charged on money borrowed to purchase shares and units.</p>	<input type="checkbox"/>	<input type="checkbox"/>
<p>➤ Have you made any gifts or donations? ie: Charities or school building funds? Please provide details.</p>	<input type="checkbox"/>	<input type="checkbox"/>
<p>➤ Have you had any expenses relating to preparing and lodging your previous years tax return? ie: Tax agent fees, expenses relating to advice from a registered agent or travel in obtaining tax advice? Details required.</p>	<input type="checkbox"/>	<input type="checkbox"/>
<p>➤ Have you paid Sickness and Accident or Income Protection Insurance premiums?</p>	<input type="checkbox"/>	<input type="checkbox"/>
<p>➤ Have you made personal contributions to a complying superannuation fund that you want to claim a deduction for? If yes, please provide a section 290-170 notice.</p>	<input type="checkbox"/>	<input type="checkbox"/>

3. OTHER DEDUCTIONS	Yes	No
<ul style="list-style-type: none"> <li>➤ Please provide any details on these often overlooked items: parking fees and tolls; batteries for calculators; borrowing costs for negative gearing; travel between work and studies; travel to investment seminars for investors; capital works deduction on income producing buildings.</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>
4. TAX OFFSETS	Yes	No
<ul style="list-style-type: none"> <li>➤ Were you a member of a private health fund(s)? [Please provide a copy of the annual private health statement for the 2017 financial year for you and your spouse].</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"> <li>➤ Have you contributed any superannuation on behalf of your spouse? Provide details.</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"> <li>➤ Is your normal residence in a remote or isolated area of Australia?</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"> <li>➤ Net medical expenses for Disability Aids, Attendant Care or Aged Care?</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"> <li>➤ Did you maintain any of the following;                             <ul style="list-style-type: none"> <li>➤ A spouse who was an invalid or cared for an invalid?</li> <li>➤ You or your spouse's parent, who lived in Australia and who was an invalid or cared for an invalid?</li> <li>➤ You or your spouse's invalid child, brother or sister, aged 16 years or older?</li> </ul> </li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"> <li>➤ If you are exempt from paying the Medicare Levy, please provide a copy of the relevant statement.</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"> <li>➤ Do you have a HECS / HELP debt?</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"> <li>➤ Did you pay or receive any child support? If yes, please provide details payments made / payments received.</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>
5. Personal / Business Lending	Yes	No
<ul style="list-style-type: none"> <li>➤ 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.</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"> <li>➤ Would you like to have your lending position reviewed?</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>

6. Financial Planning	Yes	No
➤ Are you in control of your finances and do you have a Wealth Creation Plan to achieve your goals?	<input type="checkbox"/>	<input type="checkbox"/>
➤ Would you like to have your Wealth Creation strategies reviewed?	<input type="checkbox"/>	<input type="checkbox"/>
➤ Would you like us to assess if your current super and investments are on track to providing you with financial security?	<input type="checkbox"/>	<input type="checkbox"/>
➤ Would you like to have your personal insurances reviewed to ensure you are adequately protected and is structured tax and cost effectively?	<input type="checkbox"/>	<input type="checkbox"/>
7. Property		
➤ Would you like us to show you how investing in property can take years of your current home loan?	<input type="checkbox"/>	<input type="checkbox"/>
➤ Would you like to invest in property with your superannuation?	<input type="checkbox"/>	<input type="checkbox"/>
8. Other		
➤ Have you worked in the UK?	<input type="checkbox"/>	<input type="checkbox"/>
➤ Do you have a fund in the UK and would you like to look at options to transfer this?	<input type="checkbox"/>	<input type="checkbox"/>
Please note below any items that may require further information or explanation. We also value your feedback. Please provide your comments below.		

**Thank you for taking the time to complete this questionnaire.**