

## Personal Income Tax Return - Year End Questionnaire 2023

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 (ATO) has the ability to check your return income against independent sources. In particular, this applies to PAYG Payment Summary income, interest received, dividends and asset sales.

For deductions, keep in mind that self-assessment applies. In the event of an ATO 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 maximise deductions and avoid unnecessary costs, as 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 complete this questionnaire (one for each person), attach all relevant documentation, sign and date this form below, and return your questionnaire and documentation to us by:**

1. Email to [clientcare@mckinleyplozman.com.au](mailto:clientcare@mckinleyplozman.com.au); or
2. Delivering information to Level 2, 5 Davidson Terrace, Joondalup WA 6027; or
3. Delivering information to Ground Floor, 218 St Georges Terrace, Perth WA 6000; or
4. Posting information to PO Box 635, Joondalup WA 6919; or
5. Posting information to GPO Box B95, Perth WA 6838; or
6. Book a face-to-face appointment at our Joondalup office by calling (08) 9301 2200.

**IMPORTANT:** Please note if you are planning to send your documents via email in a ZIP folder (compressed folder), please ensure you password-protect the folder and advise us of the password when you send it through. This will keep your data secure, and our system's anti-virus software won't block the email from reaching us. If you aren't sure how to set a password, [here's an instructional video](#).

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 ATO lodgement deadline? |                |
| 2. For finance application?                    | Date required: |
| 3. Other (please specify)?                     | Date required: |

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*I hereby instruct you to prepare my Taxation Return for the financial year ended 30 June 2023.*

*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:

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 salary/wage income for the 2023 Financial Year? N.B. we can obtain these details from the ATO portal once available.		
➤ Did you receive directors' fees, allowances or any other employment related income, not included in your salary/wage income above?		
➤ Have you received any Employment Termination Payments (ETPs)?		
➤ Have you received any Australian Government pensions, allowance and payments?		
	<b>Enc- losed</b>	<b>N/A</b>
➤ Have you received any Australian Superannuation Income Stream, Lump Sum Superannuation payments or income from Annuities?		
➤ Did you receive any interest from Bank accounts?		
➤ Did you receive any dividends / distributions from investments?		
➤ Did you participate in an employee share scheme during the 2023 financial year? If so, please provide paperwork.		
➤ Have you received or are you entitled to receive a distribution of income / loss from a partnership, trust, managed fund or forestry investment scheme?		
➤ Did you acquire or dispose of any investments, which may include real estate, shares, collectables, listed & unlisted securities, crypto-currencies etc.? [Note - Buy, sell contracts and settlement statements will be required].		
➤ 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 – 2023' in respect of the business.		
➤ Do you run a primary production (i.e. farming) business?		
➤ Did you receive any income from sources 'Outside of Australia', whether pensions, interest, dividends, rent, employment or other income?		
➤ Have you cashed in any life insurance policies during the 2023 financial year?		
➤ Have you received rental income or made your property available for rent? If yes, please complete the 'Rental Property Questionnaire 2023' for each property .		
➤ Have you received any other income not covered in the previous questions?		

2. DEDUCTION	Enclosed	N/A
<ul style="list-style-type: none"> <li>➤ Have you incurred motor vehicle expenses whilst travelling in the course of your employment? Have you maintained a logbook and can provide records of expenses? Alternatively, please provide evidence of kilometres travelled.</li> </ul>		
<ul style="list-style-type: none"> <li>➤ 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 logbook percentage.</li> </ul>		
<ul style="list-style-type: none"> <li>➤ 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).</li> </ul>		
<ul style="list-style-type: none"> <li>➤ 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.]</li> </ul>		
<ul style="list-style-type: none"> <li>➤ 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.</li> </ul>		
<ul style="list-style-type: none"> <li>➤ 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, computer hardware and software purchases, seminars and stationery?</li> </ul>		
<ul style="list-style-type: none"> <li>➤ Did you work from home during the 2023 Financial Year? If so, please indicate the number of hours per week up until 28/02/23 (4-week diary). _____ From 01/03/23, a daily diary is required. Another option is actual expenses (4-week diary + copies of bills).</li> </ul>		
<ul style="list-style-type: none"> <li>➤ 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.</li> </ul>		
<ul style="list-style-type: none"> <li>➤ Have you made any gifts/donations? E.g. charities, school building funds? Please provide details. <i>N.B. raffle tickets or GoFundMe payments are not considered a donation.</i></li> </ul>		
<ul style="list-style-type: none"> <li>➤ Have you had any expenses relating to preparing and lodging your previous year’s tax return? ie: Tax agent fees, expenses relating to advice from a registered agent or travel in obtaining tax advice? Details required.</li> </ul>		
<ul style="list-style-type: none"> <li>➤ Have you personally paid sickness, accident or income protection insurance premiums?</li> </ul>		
<ul style="list-style-type: none"> <li>➤ Have you made personal contributions to a complying superannuation fund that you want to claim a deduction for? If yes, please provide notice of intent to claim form.</li> </ul>		

3. OTHER DEDUCTIONS	Enclosed	N/A
<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 etc.</li> </ul>		
4. TAX OFFSETS	Yes	No
<ul style="list-style-type: none"> <li>➤ Were you a member of a private health fund(s)? Note this information will be available online from mid-July.</li> </ul>		
<ul style="list-style-type: none"> <li>➤ Have you contributed any superannuation on behalf of your spouse? Please provide details.</li> </ul>		
<ul style="list-style-type: none"> <li>➤ Is your normal residence in a remote or isolated area of Australia?</li> </ul>		
<p>Did you maintain any of the following;</p> <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>		
<ul style="list-style-type: none"> <li>➤ If you are exempt from paying the Medicare Levy, please provide a copy of your Medicare exemption certificate.</li> </ul>		
<ul style="list-style-type: none"> <li>➤ Do you have a HELP, SSL, TSL or SFSS debt?</li> </ul>		
<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>		
<ul style="list-style-type: none"> <li>➤ Did you become, or cease to become a resident of Australia? If yes, please provide dates:  _____ to _____.</li> </ul>		

Other areas MP+ can assist you		
5. Personal / Business Lending	Yes	No
<ul style="list-style-type: none"> <li>➤ Our Finance experts have access to over 30 lenders, and offer a free analysis of your existing borrowings. They can also ensure your loans are structured effectively to reduce interest rates, bank fees and the term of your loans.</li> </ul> <p>Would you like to have an analysis of your existing borrowings or your lending position reviewed at no charge?</p>		

6. Wealth Creation	Yes	No
➤ Are you in control of your finances and do you have a Wealth Creation Plan to achieve your goals?		
➤ Would you like to have your Wealth Creation strategies reviewed?		
➤ Would you like us to assess if your current super and investments are on track to providing you with financial security?		
➤ Are you interested in Self-Managed Superannuation?		
➤ Would you like to have your personal insurances reviewed to ensure you are adequately protected and is structured tax and cost effectively?		
➤ Are you considering retiring in the next few years, and would like to consider a range of strategies to maximise your income in retirement?		
➤ Would you like a meeting, at no charge, to discuss any of the above?		
7. Wills & Estate	Yes	No
➤ Do you have a current Will?		
➤ Have your circumstances changed since you signed your last will (i.e. marriage, children, grandchildren, divorce)?		
➤ Have you nominated an attorney to deal with your assets if you're unable to?		
➤ Have you nominated a guardian to help you (personally) if you're unable to?		
➤ Are you a beneficiary of, or have you received a distribution from, a deceased estate?		
➤ Dealing with the death of a family member is stressful enough without having to worry about their estate affairs as well. <b>Would you like a meeting, at no charge, to discuss any of the following?</b> Estate advice; tax, superannuation, life insurance, property, and administration of deceased estates.		
8. Other	Yes	No
➤ Have you worked in the UK?		
➤ Is there anything else we can help you with, or do you have any further comments?		

Thank you for taking the time to complete this questionnaire.