

2024 TAX RETURN QUESTIONNAIRE

2024 INDIVIDUAL TAX RETURN

1. Please **complete / confirm** your details below to the best of your knowledge.
2. All information supplied should be for the **period 1 July 2023 to 30 June 2024**, unless stated otherwise.
3. **Provide all supporting documents** where prompted and applicable.
4. **Sign** where indicated and submit to our office.
5. Once submitted we will review and book your end of financial year appointment with us.

YOUR CONTACT DETAILS

NAME		
SPOUSE		
EMAIL		
WORK #	HOME #	MOBILE #
ADDRESS		
POSTAL		

Bank Details

If you are expecting a refund, you MUST provide the ATO your EFT Bank Details

BANK NAME	BSB #	ACCOUNT #	ACCOUNT NAME

Children

NAME	Date of Birth

Income Statements

Only complete & attach if you received PAYG statements from your employer. Otherwise we can access them via our ATO Portal

EMPLOYER	OCCUPATION	GROSS	TAX
		\$	\$
		\$	\$
		\$	\$

Bank Interest

As your Tax Agent we should have access to your interest & dividend information. Only provide if you have on hand

BANK	AMOUNT	TFN CREDITS	BANK CHARGES
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$

Work & Other Expenses

Please attach your detailed listing

EXPENSE TYPE	AMOUNT	EXPENSE TYPE	AMOUNT
Taxi Fares	\$	Reference Books	\$
Other Travel	\$	Stationery	\$
Uniform / Laundry	\$	Mobile Phone	\$
Sun Protection Items	\$	Internet	\$
Self-Education	\$	Memberships	\$
Union Fees	\$	Tools & Equipment	\$
Seminars / Prof Development	\$	Interest Expenses	\$
Gifts & Donations	\$	Income Protection Insurance	\$
Other Expenses	\$	<i>(please include in detailed listing)</i>	

Home Office Claim

Attach your 2024 Working from Home Diary for us to discuss your claim (if you have one).

Private Health Insurance

Do you have private health insurance? Y N

Do you have any of these items?
Investment Income, Rental Properties,
Investments Sold or Motor Vehicles used for Work Y N

YES - please complete relevant sections below
NO - please proceed to the end of the form, provide supporting documents.

INVESTMENT INFORMATION

Dividends

COMPANY	DATE PAID	UNFRANKED	FRANKED	IMP. CREDITS	TFN CREDITS
		\$	\$	\$	\$
		\$	\$	\$	\$
		\$	\$	\$	\$

Unit Trusts

TRUST	TRUST INCOME	TFN CREDITS	IMP. CREDITS	CAPITAL GAINS	FOREIGN INCOME	FOREIGN TAX
	\$	\$	\$	\$	\$	\$
	\$	\$	\$	\$	\$	\$

Investments Sold / Disposed

COMPANY / TRUST	DATE SOLD	NO. SOLD	AMOUNT RECEIVED	DATE PURCHASED	NUMBER PURCHASED	AMOUNT PAID
			\$			\$
			\$			\$
			\$			\$

Superannuation Contributions

Please list your total Personal (NOT Employer) Superannuation contributions

SUPER FUND NAME	TOTAL AMOUNT
	\$

Cryptocurrency

Do you have ANY Cryptocurrency transactions during the year? Y N

YES - we will need to liaise with you to have your Crypto transactions uploaded into a tax calculator to calculate your Crypto gains for tax purposes.

MOTOR VEHICLE INFORMATION

Vehicle & Log Book

LOGBOOK KEPT Y N	PERIOD COVERED BY LOGBOOK <i>(within last 5 financial years)</i>
VEHICLE PLATE NO.	MAKE & MODEL
OWNER OF VEHICLE	DRIVE OF VEHICLE
TOTAL KMs TRAVELLED IN YEAR	BUSINESS KMs IN LOGBOOK PERIOD
DATE PURCHASED	PURCHASE PRICE \$
HOW WAS VEHICLE FINANCED? Lease Paid Cash Chattel Mortgage Hire Purchase	
DATE SOLD <i>(if in this tax year)</i>	SALE PRICE \$

Running Costs

COST TYPE	ANNUAL AMOUNT (inc. GST)	MONTHLY PAYMENTS
Fuel / Oil	\$	
Registration	\$	<i>Please provide a copy of your Hire Purchase / Lease / Chattel Mortgage Agreement when you reach the end of the form.</i>
Insurance	\$	
Repairs & Maintenance	\$	
Lease Payments	\$	\$
Hire Purchase / Chattel Mortgage Payments	\$	\$
Interest Paid	\$	\$
Services	\$	\$
Tyres / Battery	\$	\$
Membership Fees	\$	\$
Parking & Tolls	\$	\$

RENTAL PROPERTY INFORMATION

Please complete one of these schedules per Property.

If the property is managed, you don't need to fill in all the details below. Instead please list the expenses that you have paid yourself outside of the managing agent and attach the annual summary.

Property Details

ADDRESS OF RENTAL PROPERTY

DATE PURCHASED	DATE RENTAL INCOME FIRST EARNT
NO. WEEKS AVAILABLE FOR RENT <i>(this year)</i>	DATE BUILT
OWNERSHIP DETAILS	100% My name 50%/50% Joint with spouse Other

If a rental property has been purchased/sold this year, please provide the settlement statement and other costs: e.g. stamp duty, legal fees, renovations or initial repairs, and any loan application fees and/or mortgage discharge expenses when you reach the end of the form.

Income

GROSS RENT	OTHER RENTAL INCOME
\$	\$

Expenses

EXPENSE TYPE	AMOUNT	EXPENSE TYPE	AMOUNT
Advertising for Tenants	\$	Stationery, Phone & Postage	\$
Borrowing Expenses	\$	Cleaning	\$
Council Rates	\$	Gardening / Lawn Mowing	\$
Insurance	\$	Interest on Loan(s)	\$
Land Tax	\$	Legal Fees	\$
Pest Control	\$	Property Management Fees	\$
Repairs & Maintenance	\$	Property Man. Commissions	\$
Body Corporate Fees	\$	Other Expenses	\$
Water Charges	\$		

Depreciable Items

ITEM	DATE PURCHASED	COST
		\$
		\$
		\$

Improvements / Construction Costs

Have you had a Tax Depreciation schedule prepared? Y N

If Yes, please provide this if C&R do not already hold a copy. If no, please itemise details below:

ITEM	DATE	COST
		\$
		\$
		\$

OTHER INCOME OR EXPENSES

Please list any other information that you believe may assist us

SUPPORTING DOCUMENT CHECKLIST

- Income Statement from your myGov Account / Payment Summaries
- Detailed Work Expenses Listing
- Private Health Statement (Optional)
- Out of Pocket Medical Expense Claims
- Unit Trust Tax Year Summary
- Motor Vehicle Hire Purchase / Lease / Chattel Mortgage Agreement
- Rental Property Purchase Settlement Statement / Costs
- Rental Property Depreciation Schedule (as prepared by Third Party)
- Letter listing tax deductibility of Income Protection Premiums from your insurance provider
- Confirmation letter from your superannuation fund noting intent to claim tax deduction for contributions