

## 2020 Personal Tax Return Instructions

### Your details

Your last name	
Your given names	
Postal address	
Residential address (if different to postal address)	
Tax File Number (TFN)	
Date of birth	
Your occupation	
Work phone #	
Mobile phone #	
Home phone #	
Fax #	
Email address	
Contact me during normal office hours	At home / at work / on mobile
The ATO will no longer issue cheques for refunds. Refunds will be credited directly to your bank account. Please provide your bank account details:	BSB: Account #:  Account name:
Send a copy of my completed return by:	Fax / email / post / I will collect

### Your family's details

Spouse surname, if different (including same sex couples)				
Spouse given names				
Did you have a spouse for the full year?				
If no, period you had a spouse	From ___/___/___ to ___/___/___			
Spouse date of birth	___/___/___			
<b>Spouse income (we prefer a copy of the return)</b>	<b>Dependent children's details (if applicable)</b>			
Taxable income	\$	<b>Name</b>	<b>Date of birth</b>	<b>Taxable income</b>
Govt pensions & allowances	\$		___/___/___	\$
Exempt pension income	\$		___/___/___	\$
Reportable fringe benefits	\$		___/___/___	\$
Reportable Super contributions	\$		___/___/___	\$
Net investment loss	\$		___/___/___	\$
Child support (paid)	\$		___/___/___	\$

## Income

### 1. Did you receive payment summaries?

Yes / No

If no, go to question 2.

If yes, we need copies of all payment summaries for wage, lump sum payments (both employer and superannuation), Australian Government pensions & allowances, annuities and superannuation income streams. For income streams, we also need any letter(s) and schedule(s) sent to you by the provider with your payment summary.

### 2. Did you receive interest from banks?

Yes / No

If no, go to question 3.

If yes, record details below showing the total interest received on each account or provide bank statements etc.

Name of bank	Account #	Total interest	Tax withheld	# of holders
		\$	\$	
		\$	\$	
		\$	\$	
		\$	\$	
		\$	\$	

### 3. Did you receive dividends from shares held?

Yes / No

If no, go to question 4.

If yes, read on and fill in the details below with total dividends received or send all dividend statements.

NB 1 Dividends reinvested must be declared as income, even though you didn't receive any money.

NB 2 Dividends are assessable in the year of payment. Look for the date of payment on the dividend statements.

Company	Unfranked	Franked	Imp Credit	Tax Withheld	# of holders
	\$	\$	\$	\$	
	\$	\$	\$	\$	
	\$	\$	\$	\$	
	\$	\$	\$	\$	

### 4. Did you receive distributions from managed funds?

Yes / No

Managed funds are investments in unit trusts such as BT, Colonial, MLC etc

If no, go to question 5.

If yes, we need annual tax statements from each fund.

### 5. Did you sell any assets?

Yes / No

If you sold assets such as shares or property which were acquired after 20 September 1985, you may have to pay capital gains tax (CGT). Your main residence is exempt from CGT providing it was never used to produce income.

If no, go to question 6.

If yes, we need documents which show dates and amounts for purchase, sale and incidental costs. For managed funds, we need the CGT statement from the fund manager or documents showing cost and sale amounts for all units sold.

### 6. Did you receive rental income?

Yes / No

If no, go to question 7.

If yes, we need a summary of income and expenses for each rented property or the agent's annual or monthly statements and a summary of expenses paid by you direct.

Also, send loan statements or advise amount of interest paid on any loan to buy each property.

Also, send solicitor's letter, including settlement sheets, and a quantity surveyor's report if the property was purchased during the year.

### 7. Did you receive any other income not referred to above?

Yes / No

If no, go to question 1 under Deductions.

If yes, attach details. Other income could include foreign income or pensions, distributions from partnerships and/or trusts, income from your own business, bonuses from life insurance companies or friendly societies, income from forestry managed investment schemes, amounts for lost salary or wages paid under an income protection or sickness and accident policy or workers compensation scheme and discounts on shares or rights acquired under an employee share scheme.

For the latter, we will need your employee share scheme statement which should have been given to you by your employer. If you had business income, you will also need to provide us with either your cashbook/MYOB etc file or a summary of income and expenses, including GST calculations if you are a GST-registered business.

## Deductions

VIP if your total work-related expenses exceeds \$300 (excluding car expenses and claims against certain allowances) you must have receipts to prove the total amount, not just the amount over \$300.

1. Did you use your car for work and keep a log book?			Yes / No	
<p>If no, go to question 2. If yes, you are entitled to claim the cost of using your car for work based on a log book kept for a continuous period of 12 weeks within the last five years.</p> <p>Insert details of your car and expenses incurred here and go to question 3.</p>	Make		Model	
	Date purchased		Business use	%
	Cost	\$	Year log book kept	
	Petrol and oil	\$	Interest paid	\$
	Registration	\$	(send loan or lease agreement if this is the first year of your claim or you are a new client)	
	Comp insurance	\$	Services	\$
	Green slip	\$	Tyres and batteries	\$
	Pink slip	\$		
	Repairs	\$		
Lease payments	\$			

2. Did you use your car for work and NOT keep a log book?			Yes / No	
<p>If no, go to question 4. If yes, insert the details of your car here and go to question 3.</p> <p>VIP you must exclude trips between home and your normal place of work (some exceptions do apply to this rule – contact our office for more details)</p>	Make		Model	
	Engine capacity	Litre	Cost of car	\$
	Business Kms		Expenses this year	\$
	You are entitled to claim the cost of using your car for work based on a <u>reasonable estimate</u> of the kilometres travelled up to a maximum of 5,000kms per car.			

3. Tell us how you used your car for work here:

4. Did you incur work-related travel expenses?			Yes / No	
<p>If no, go to question 5. If yes, record details here.</p>	Taxis	\$	Accommodation	\$
	Buses	\$	Meals	\$
	Trains	\$	Car hire	\$
	Parking	\$	Airfares	\$

5. Did you incur work-related clothing expenses?			Yes / No	
<p>If no, go to question 6. If yes, record details here. Please note that you cannot generally claim a deduction for <b>conventional clothing</b></p>	Compulsory uniform	\$	Dry clean uniforms	\$
	Non-compulsory uniform	\$	Home laundry	washes/wk
	Occupation specific	\$	Home laundry of uniforms or protective clothing only. Not conventional nor everyday clothing.	
	Protective clothing	\$		
	Work boots	\$	Sun hats	\$

6. Did you incur self-education expenses?			Yes / No	
<p>If no, go to question 8. If yes, you can claim a deduction if your self-education expenses related to work as an employee at the time you were studying.</p> <p>Deductions cannot be claimed simply because you received Youth Allowance, Austudy or Abstudy. Nor can you claim self-education expenses that will help you to get a new job.</p> <p>If you satisfy these conditions, complete these details and go to question 7.</p>	Course description			
	Name of school, college or university			
	Date commenced			
	Date finished			
	Fees (not HELP)	\$	Home office hours	Hrs/Week
	Text books	\$	Home office weeks	Weeks
	Stationery	\$	Kilometres travelled*	
	Photocopying	\$	Description of car	
	Student union	\$	Engine capacity	Litre

\* You can claim the kilometres travelled directly between home or work and your place of education and return. If you travel from home to your place of education and on to work or from work to your place of education and home, only claim the first leg of each trip.

7. Tell us how your course is work related here:

8. Did you incur any other work-related expenses?

Yes / No

If no, go to question 9.

If yes, enter total expenses (before private use if any) on the right and indicate below the proportion of work use of those items also used for private purposes. Also, enter below that, equipment costing more than \$300 per item.

Computer software	\$	Safety equipment	\$
Computer supplies	\$	Stationery	\$
Conferences / seminars	\$	Subscriptions	\$
Home office	Hrs/Week	Sun screen / glasses	\$
Internet access (total)	\$	Telephone – home	Calls/week
Meal allowance rec'd	/meal	Telephone – mobile	\$
Meal allowance spent	/meal	Tools (<\$300/item)	\$
Office equip (<\$300/item)	\$	Union fees	\$
Postage	\$	Reference books/journals	\$
Professional fees	\$	Repairs	\$

**Work-related equipment purchased costing more than \$300**

**Work & private use items**

Description	Cost	Date of purchase	Business use	Item	Work use
	\$	___/___/___	%	Computer	%
	\$	___/___/___	%	Internet access	%
	\$	___/___/___	%	Mobile phone	%

9. Did you pay interest on investment loans (excluding rental properties)?

Yes / No

If no, go to question 10

If yes, complete these details

Lender's name and description of investment	Interest paid
	\$
	\$
	\$

10. Did you donate to charities or school building funds?

Yes / No

If no, go to question 11

If yes, complete these details or attach a list. Receipts will confirm that the donation is deductible.

Name of charity or building fund	Amount donated
	\$
	\$
	\$

11. Do you have any other deductions not referred to above?

Yes / No

If no, go to Q1 at Tax Offsets

If yes, complete these details.

VIP: to claim a deduction for personal super contributions, you must notify the fund and receive a written acknowledgement of your intention to claim the deduction

Income protection insurance	\$
Tax return fee last year (if not prepared by us)	\$
Personal (deductible) superannuation contributions	\$

## Tax Offsets

1. Do you have private patient hospital cover?

Yes / No

If no, go to question 3.

If yes, we need your private health insurance statement, and go to question 2.

2. If you have private patient hospital cover, were all of your dependants (including your spouse if applicable) covered for the whole of the year?

Yes / No

Medicare levy surcharge may be payable if you or your dependants (including your spouse) do not have an appropriate level of private patient hospital cover for the whole of the year. An appropriate level of cover is a policy which has an excess of \$500 or less (1 person) or \$1,000 or less (all others).

3. Did you make superannuation contributions for your spouse?

Yes / No

If no, go to question 4.

If yes, insert details here.

Amount contributed (\$):

4. Did you live in a remote area of Australia or serve overseas?

Yes / No

If no, go to question 5.

If yes, insert details here.

Location	Period from	Period to

## Other

1. Do you have a HELP or SFSS debt?	Yes / No
If no, go to question 2.	HELP balance at 30 June \$
If yes, insert amount(s) owing here:	SFSS balance at 30 June \$
2. Have you paid Pay As You Go (PAYG) Income Tax Instalments this year?	Yes / No
If no, go to question 3.	Total paid \$
If yes, show the total paid here.	
3. Are you a new client to our practice?	Yes / No
If no, go to question 4.	
If yes, please send us a copy of your return for the previous financial year.	
4. Please write here any other information about your return.	

## Have you provided the following?

- PAYG summary showing your income and tax withheld
- Bank interest details or statements
- Dividend information or dividend statements
- Managed fund tax statements
- Details for any sold assets including initial purchase
- Rental details including income and expenses such as interest on loans
- Work related car expenses with logbook if applicable plus how your car is used for work
- Work related travel expenses
- Work related clothing expenses
- Self-education expenses and how your education is related to your work
- Other work related expenses
- Interest on investment loans
- Donations to charities or building funds
- Any other deductions as described in point 11 of Deductions
- Private health insurance statement
- Spouse superannuation contribution details
- Remote area or overseas service details
- Medical expenses details
- HELP and SFSS debt details
- PAYG Income Tax Instalment details