

2010 Tax Return Questionnaire

Please complete both sides of this form to assist us in completing your income tax return.

Name: _____

Address: _____ Email: _____

Phone (Home): _____ Work: _____ Mobile: _____

Preferred method of contact: Home Phone Work Phone Mobile Email

Preferred day/s of contact: Mon Tues Wed Thurs Fri Any day

Preferred time of contact: Morning Afternoon Any time

1. What was your main occupation this financial year _____

2. Do you have any dependents? If so, how many _____

3. Please let us know if there have been any changes in your family situation that may affect your tax. These include:

- | | |
|--|---|
| <input type="checkbox"/> Any of your children turned 16 since your last tax return | <input type="checkbox"/> New children |
| <input type="checkbox"/> Separation or divorce | <input type="checkbox"/> New partner or married |
| <input type="checkbox"/> Any of your children have left home | <input type="checkbox"/> Ages of dependent children |

Details: _____

4. If you receive a refund, it will be paid directly into your bank account by the ATO, please provide the details of your preferred account.

- Name on account: _____
- BSB (Branch No.): _____ ■ Account No: _____

If you require a copy of your assessment notice, please collect it from our office.
 Any other questions/comments: _____

5. INCOME:

- | | | |
|---|-----|----|
| ➤ Have you attached all of your Payment Summaries (Group Certificates) | YES | NO |
| ➤ Have you attached all of your Centrelink Group Certificates | YES | NO |
| ➤ Have you earned any interest from your bank accounts | YES | NO |
| Details: _____ | | |
| ➤ Have you received any dividends | YES | NO |
| Details: _____ | | |
| ➤ Have you sold any shares | YES | NO |
| (Attach documents relating to their original purchase and their sale) | | |
| ➤ Have you bought or sold any property this year Land, House etc. | YES | NO |
| Details: _____ | | |
| ➤ Do you have a rental property (Attach a rental property checklist) | YES | NO |

6. WORK EXPENSES:

- Do you ever use your own **car** for work - Carrying tools, going to the bank, shopping, training and seminars, deliveries etc. YES NO
- If yes, where did you go _____
- How many kilometres have you travelled during the year for work purpose _____

What sort of car is it and what is the engine size _____

- Do you have to wear a **uniform** or protective clothing for work YES NO
How much have you spent on uniforms or protective clothing (overalls, aprons) this year
Details & amount spent _____
- Have you bought any **boots** or protective shoes this year YES NO
Details & amount spent _____
- If you work **outdoors**, have you bought sunscreen, hats or sunglasses
Details & amount spent: _____ YES NO
- Have you undertaken any **training** (TAFE, University, OTEN, seminars) during the year
Details: _____ YES NO
Did you pay for course fees, books, stationery, photocopying,
accommodation, tools or equipment, travelling costs YES NO
Details & amount spent: \$ _____
- Have you paid for any - membership fees, union fees, telephone calls, internet,
books, magazines, journals, tools, computer equipment or any **other expenses**
related to your work YES NO
Details & amount spent \$ _____

7. OTHER:

- Have you made any **donations** to charities YES NO
If yes, which ones and how much _____
- How much did you pay for **preparing your tax** return last year \$ _____
- What is your **spouse's income** for the year \$ _____
Spouse's name _____
- Have you paid for any **education expenses** for your school aged children YES NO
If yes please request Education Tax Refund Questionnaire
- Have you spent over \$1500.00 on **Private Medical expenses** after Medicare and
Health Insurance rebates (provide details) YES NO
- Do you have **private health** insurance (Please attach letter from fund) YES NO
Which fund _____ Membership number _____
- Do you have **sickness and accident insurance** YES NO
Details and amount spent _____
- Have you made **child support** payments YES NO
Details _____
- Have you acquired **shares** through an **employee share scheme** YES NO
Details _____

OFFICE USE ONLY

When collecting return details:

- Appointment **OR** Dropped in
 Price quoted: _____
 Fee from Refund - \$20 (assessment notice sighted)
OR
 Account to be settled before lodgement, and
Refund deposited directly into bank account by the ATO

Date to be completed: _____

■ Completed by: _____

■ Date received: _____

When Signing:

- Chq for SEA for: _____
■ Refund Due? YES or NO \$ _____
■ Other Notes:

■ Questions answered by: _____

■ Date Completed: _____