



2023 Tax Return Questionnaire

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

Name: _____ Email: _____

Address: _____

Phone - Home: _____ Work: _____ Mobile: _____

1. What was your main occupation this financial year _____
2. Do you have any dependents? If so, how many, and what ages are they? _____
3. Please let us know if there have been any changes in your family situation which may affect your tax. These include:
 - Any of your children turned 16 since your last tax return
 - Single/separation date _____
 - Any of your children have left home
 - New children
 - New partner or married

Details: _____

4. INCOME:

The ATO has information on your Payment Summary, Centrelink and Pension income

- Have you earned any interest from your bank accounts? YES NO
Details: _____
- Have you received any dividends or payments from other investments? YES NO
Details: _____
- Did you run your own business? YES NO
Details: _____
- Have you sold any shares, or other investments eg Crypto? YES NO
(Attach documents relating to their original purchase and their sale)
- Have you bought or sold any investment properties this year Land, House etc? YES NO
Details: _____
- Do you own a property which is rented, including Air B&B (Attach a rental property checklist) YES NO

5. WORK EXPENSES:

- Do you ever use your own car for work - training and seminars, deliveries, client visits, carrying equipment weighing 20 kg's or more, etc? YES NO
If yes, where did you go? _____
How many kilometres have you travelled during the year for work purpose? _____
- Did you stay overnight anywhere for work purposes or travel by public transport? YES NO
Details: _____
- Do you have to wear a **uniform with a logo** or protective clothing for work? YES NO

- How much have you spent on uniforms or protective clothing (overalls, boots, aprons) this year?
Details & amount spent: _____
- If you work **outdoors**, have you purchased sunscreen, hats, or sunglasses? YES NO
Details & amount spent: _____
- Have you undertaken any **training** (TAFE, University, Online) during the year?
Details: _____ YES NO
If so, did you pay for course fees, books, stationary, photocopying, accommodation, tools, internet,
computer equipment or travelling costs relating to the course? YES NO
Details & amount spent: _____
- Have you paid for any - membership fees, union fees, books, magazines, journals, stationary, tools,
computer equipment or any **other expenses** related to your work? YES NO
Details & amount spent: _____
- Do you use your mobile or internet for work? Do you work from home? YES NO
Details & amount spent: _____

6. OTHER

- Did you have any expenses relating to your investment income? YES NO
Details: _____
- Have you made any **donations** to charity? 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 taxable income for the year? _____
Spouse's name and date of birth _____
- Do you have **private hospital health** insurance? (Please attach letter from fund) YES NO
Name of Fund _____ Membership number _____
Benefit Code _____ Tax Claim Code _____
- Do you have **sickness and accident** insurance which is paid outside of your superannuation fund? YES NO
Details and amount spent: _____
- Did you make any personal Superannuation contributions? Please attach your confirmation letter. YES NO
- Have you or your spouse made **child support** payments? YES NO
Details and amount: _____

The signing of this form indicates your agreement to the terms and conditions, available upon request.

Signature.....Date.....