

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Phone No: Day: \_\_\_\_\_

Mobile: \_\_\_\_\_

Email Address: \_\_\_\_\_

**INCOME**

	Y	N
Salary / Wages / Centrelink (PAYG Forms)	<input type="checkbox"/>	<input type="checkbox"/>
Eligible Termination Payment	<input type="checkbox"/>	<input type="checkbox"/>
Interest Received	<input type="checkbox"/>	<input type="checkbox"/>
Dividends / Distributions	<input type="checkbox"/>	<input type="checkbox"/>
Shares or options from Employee Share Schemes	<input type="checkbox"/>	<input type="checkbox"/>
Partnership / Trust	<input type="checkbox"/>	<input type="checkbox"/>
Capital Gains (e.g.property or shares sold)	<input type="checkbox"/>	<input type="checkbox"/>
Foreign Employment Income	<input type="checkbox"/>	<input type="checkbox"/>
Rental Income	<input type="checkbox"/>	<input type="checkbox"/>
Other Income	<input type="checkbox"/>	<input type="checkbox"/>

Please include copies of your Group Certificates  
 Attach ETP Statements  
 Include either bank statements or a summary of interest received.  
 Include statements of dividends paid from 01/07/10 to 30/06/11  
 Include any statements showing value of shares and date of acquisition  
 Include yearly Tax Summaries from trusts such as BT, Colonial, AXA etc.  
 Please included details of sale and purchase and copies of contracts  
 Include PAYG Summaries, receipts, statements & any other information relevant  
 Please provide details of rent income and expenses including interest on loans.  
 Please include details of any other income received during the year.

**DEDUCTIONS**

<b>Work related Car Expenses</b>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Work related Travel Expenses</b>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Uniforms, Prot Cloth, CL&amp;M, etc</b>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Other Work Expenses</b>	<input type="checkbox"/>	<input type="checkbox"/>
Diary / Stationery / Work Materials / Tools	<input type="checkbox"/>	<input type="checkbox"/>
Union or Professional fees	<input type="checkbox"/>	<input type="checkbox"/>
Sickness & Accident Insurance / Income Protection	<input type="checkbox"/>	<input type="checkbox"/>
Seminar costs or Self Education	<input type="checkbox"/>	<input type="checkbox"/>
<b>Expenses for Interest or Dividend Income</b>	<input type="checkbox"/>	<input type="checkbox"/>
Bank Fees and Interest costs	<input type="checkbox"/>	<input type="checkbox"/>
Investment advice annual review fee (but not Capital cost on Investing)	<input type="checkbox"/>	<input type="checkbox"/>
<b>Gifts or Donations &gt; \$2</b>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Tax Agent fees paid</b>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Travel to Agent: _____ km _____ cc</b>	<input type="checkbox"/>	<input type="checkbox"/>

Provide total work km's travelled or Log Book, car expenses paid & engine capacity ( \_\_\_\_\_cc)  
 Provide details of travel: accomodation, tolls, parking, fares, meals, diary >6 days.  
 Include dry cleaning & purchases of Logo'd or Protective Clothing (i.e Boots overalls etc)  
 Please provide details of all purchases including date of purchase if a single item costs more than \$300  
 Please provide details if this item is not shown on your PAYG Payment Summary  
 Please provide details  
 Please provide km's travelled, accomodation & meals, course fees, text books, printing, stationary costs and any other expenses you think relevant  
 Bank statements would provide this information  
 Please provide details or receipts of any financial advice received  
 Details or receipts to a registered charity. List charity name and amount donated  
 Please provide details of fees for accountancy work done particularly if work was not done by Clifton's  
 How many trips did you make or km's travelled to your accountant in the last financial year?

**TAX OFFSETS**

<b>Private Health Cover</b>	<input type="checkbox"/>	<input type="checkbox"/>
Do you have private health cover?	<input type="checkbox"/>	<input type="checkbox"/>
<b>Spouse</b>	<input type="checkbox"/>	<input type="checkbox"/>
Did you have a spouse for the full financial year? Y/N?	<input type="checkbox"/>	<input type="checkbox"/>
Did your dependant spouse earn any income?	<input type="checkbox"/>	<input type="checkbox"/>
Does your spouse receive any benefits from Centrelink?	<input type="checkbox"/>	<input type="checkbox"/>
<b>Superannuation</b>	<input type="checkbox"/>	<input type="checkbox"/>
Have you made any personal contributions to a superannuation fund?	<input type="checkbox"/>	<input type="checkbox"/>
<b>Medical Expenses</b>	<input type="checkbox"/>	<input type="checkbox"/>
You may be entitled to a rebate if your out of pocket expenses on medical exceeds \$2,000	<input type="checkbox"/>	<input type="checkbox"/>
<b>Education Tax Refund</b>	<input type="checkbox"/>	<input type="checkbox"/>
Do you have primary or secondary school students	<input type="checkbox"/>	<input type="checkbox"/>
Did you purchase any computer equipment?	<input type="checkbox"/>	<input type="checkbox"/>
Please provide totals for internet, stationary & text books for the year	<input type="checkbox"/>	<input type="checkbox"/>

Please provide a copy of the health fund statement they send after the end of the financial year  
 Please provide spouse's taxable income  
 Please provide details of benefits  
 Please provide details  
 Please provide a summarised total of your expenses ( out of pocket amounts only )  
 Include number of primary and secondary students  
 Include description of equipment and purchase price

**OTHER**

Tax free government pensions	<input type="checkbox"/>	<input type="checkbox"/>
Child support you paid	<input type="checkbox"/>	<input type="checkbox"/>
Please provide any other details which you are unsure of and would like us to be aware of	<input type="checkbox"/>	<input type="checkbox"/>

This is required to report Adjusted Taxable Income as required by the ATO  
 Child support payments reduces adjusted taxable income, increasing eligibility to benefits

\_\_\_\_\_  
 Clients Signature

\_\_\_\_\_  
 Date