

**INCOME TAX QUESTIONNAIRE**

**THIS QUESTIONNAIRE CAN BE PRINTED AND COMPLETED OR COMPLETED ON THE FORM.**

Once you have completed the tax questionnaire please email or fax the completed form along with your PAYG payment summaries to our office.

When we complete the return, we will send it to you for review and signature.

Would you like us to contact you prior to sending your return to you for review and signature ? yes or no

Preferred contact method \_\_\_\_\_

Email:

Telephone:

The ATO allows different claims for various occupations; our questionnaire is designed to suit majority of clients so we can identify the maximum amount of tax deductions for you.

Please answer all questions below if applicable.

Income Tax Questionnaire for year ended

30 June \_\_\_\_\_

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

Phone mobile: \_\_\_\_\_

Home address: \_\_\_\_\_

Postal address (if different): \_\_\_\_\_

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

Date of Birth:

Tax File Number:

ABN Number (if in business):

Please deposit my refund to (complete if details have changed since last tax return)

Bank:

BSB number:

Bank Account number:

Are you a resident for tax purposes:

Are you entitled to use the Medicare system:

Number of dependant children :

(those living with you full time and full time students up to 19 years of age)

# WARDS TAX & ACCOUNTING SERVICES

## INCOME TAX QUESTIONNAIRE

If we are preparing your tax return for the first time – please provide a copy of your last year’s tax return if claiming any depreciation from this last years tax return.

**Spouse Details – complete only if we do not prepare your spouse’s return**

1. full name
2. date of birth
3. taxable income
4. reportable fringe benefits
5. reportable superannuation contributions
6. amount of exempt Australian government pensions
7. amount of any rental property losses
8. Period during the year which you had a spouse  
whole year

or dates from \_\_\_\_\_ to \_\_\_\_\_

**Child Support (if applicable)**

9. Child support that you paid \$ \_\_\_\_\_ Number of children paid for \_\_\_\_\_

**Income**

1. What was your main occupation in this income tax year  
\_\_\_\_\_
2. Provide your PAYG payment summaries from all your employers  
number of summaries attached  
\_\_\_\_\_
3. Did you receive any taxable income from centrelink – eg youth allowance/newstart/pensions  
(we can access this information from the ATO after 20 July 2017)

Have you received any of the following – provide details

1. Directors fees \$ \_\_\_\_\_
2. ETP – eligible termination payments – please provide copies of PAYG summaries received
3. Interest earned and TFN amounts on Australian bank accounts – only include your share on your accounts and any children’s accounts (if you are trustee of the accounts)

Name of Bank	Total Interest Received	TFN Withholding

4. Did you receive any employee share schemes – provide statement

# *WARDS TAX & ACCOUNTING SERVICES*

## INCOME TAX QUESTIONNAIRE

5. Dividends from any shares held

Company Name	Franked Amount	Unfranked Amount	Tax Withheld

- 6. Income from partnerships, trusts or managed funds – provide copy of end of year tax statement
- 7. Proceeds from the sale of assets – investment property (please talk to or email our staff about this)
- 8. Rental property - complete rental property spreadsheet
- 9. Superannuation income stream/pension – attach PAYG payment summary
- 10. Lump sum superannuation payment – attach PAYG payment summary
- 11. Sickness & accident or income protection insurance – amounts received \$
- 12. Overseas pensions or payments – country and amounts received

Country received from	Type of payment	Amount in Australian \$

13. Did you sell any shares? Provide sale details and purchase details

Company	No. of Shares	Date of Purchase	Total Purchase Cost	Date of Sale	Totals Sale Proceeds

14. Did you receive any other foreign source income not included above – provide details

Country received from	Type of income	Amount in Australian \$

# *WARDS TAX & ACCOUNTING SERVICES*

## INCOME TAX QUESTIONNAIRE

### EXPENSES

Work Related Expenses – please ensure you are able to substantiate all claims – basically to be able to claim any of the following as a work deduction you must ask yourself – can I earn assessable income without the following? Are they necessary for my employment or are they convenient? Can my employer supply me with a letter confirming my usage of each deduction?

**Motor vehicle expenses** – travel in your motor vehicle. You cannot claim for travel to and from work unless the following apply. Two methods available – Log Book and cents per KM

What you can claim You can claim the cost of travelling:

- directly between two separate workplaces – for example, when you have a second job
- from your normal workplace to an alternative workplace (for example, a client's premises) while still on duty, and back to your normal workplace or directly home
- if you had shifting places of employment – you regularly work at more than one site each day before returning home
- from your home to an alternative workplace for work purposes, and then to your normal workplace or directly home. This does not apply where the alternative workplace has become a regular workplace
- if you needed to carry bulky tools or equipment you used for work and couldn't leave them at your workplace – for example, an extension ladder or a cello.
  
- Are you an employee who transports bulky/heavy tools and equipment between home and work?
- To get a tax deduction it's not enough to simply choose to carry a few tools.
- There are some simple rules that apply such as:
  - you need to use your bulky tools to do your job
  - your employer expects you to transport this equipment
  - there is no secure area to store the equipment at work.

### Method 1 – cents per km

Work meetings and conferences	Km
Carry bulky/heavy tools to work	Km
Normal workplace to alternative workplace	Km
Travel directly between 1 <sup>st</sup> and 2 <sup>nd</sup> job	Km
Travel to client premises	Km
Travel to pick up/deliver stock	Km
Travel to bank/post office	Km
Other (details)	Km
<b>Total km</b>	<b>Km</b>

# *WARDS TAX & ACCOUNTING SERVICES*

## INCOME TAX QUESTIONNAIRE 2017

**Second method – log book** – what was % of work use as per log book that you have recorded over a 3 month period – \_\_\_\_\_ %

Total of motor vehicle expenses for the whole year

Expense incurred	Amount
Registration	
Insurance	
Repairs & services	
Lease payments	
Tyres	
Interest on car loan	
Fuel	
Other	

1. Travel for employment – how was this travel work related (please explain)

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Expense	Amount paid
Parking fees	
Air fares	
Toll fees	
Accommodation	
Car hire	
Number of days living away from home (this does not apply to fly/drive in fly/drive out workers)	

# WARDS TAX & ACCOUNTING SERVICES

## INCOME TAX QUESTIONNAIRE

### Clothing (Protective &/or Uniform)

Have you purchased protective clothing or uniforms for work?

uniforms – is your uniform compulsory and distinctive to your organisation eg business logo

protective clothing – does your clothing protect you from potential injury eg safety boots, gloves, overalls

*Note: sports clothing is not allowed.*

*Please provide full details of uniforms required to be worn.*

Protective clothing/ uniforms (Please describe)	\$
Protective footwear	\$
Sunscreen/ sunhats/ sunglasses	\$

**Self Education** – did you complete any study that was work related to your current employment –

what is the course that you were studying

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Details of expense	Total Amount paid/details or % used
Course fees (not including hecs this not deductible)	
Travel to Uni/Tafe (number of km's – home to tafe/ work to tafe)	
Stationery	
Text books	
Internet (study usage only – can be a % of total internet)	
Computer -purchase price and date	
Fitness (only if required to keep an elite level of fitness for your occupation e.g. defence force trainer (not general defence)	
Other – please list	

# WARDS TAX & ACCOUNTING SERVICES

## INCOME TAX QUESTIONNAIRE

**Other work related expenses – explain how each of these relate to work**

Details of expense	Total Amount paid	How is item work related & % for work use
Stationery		
Teaching aids		
Union fees		
Memberships		
Tools (total each item must be under \$300)		
Courses/seminars		
Telephone		
software		
Sunglasses/sunscreen		
Books/journals		
internet		
Sunglasses/sunscreen		
Tools (each item over \$300 list date pch & description)		
Home office electricity	No. of hours work from home per week?	
Other deductions – please list below		

The commissioner requires a diary to be completed stating the number of hours worked at home over a continuous 4 week period to claim home office electricity.

# *WARDS TAX & ACCOUNTING SERVICES*

## INCOME TAX QUESTIONNAIRE

Have you received an overtime meal allowance and have you purchased meals when working overtime? If yes, total amount of meal allowance received and how much per meal received.

\$ \_\_\_\_\_

**Other Items**

1. have you made any gifts or donations

Name of charity	Amount paid

2. did you pay any income protection insurance premium? \$ \_\_\_\_\_
3. prior year tax return fees? \$ \_\_\_\_\_
4. did you pay any fees for investment advice? \$ \_\_\_\_\_
5. interest paid on any loans for purchase of shares or to invest in a managed fund  
\$ \_\_\_\_\_

**Other Expenses Not Included Above**

Details of expense	Amount paid
EG Income protection insurance	



# *WARDS TAX & ACCOUNTING SERVICES*

## INCOME TAX QUESTIONNAIRE

Private Health Insurance – were you and all of your dependants cover on the policy?

Please attach your end of year statement from your health insurance fund if you have or complete below details from statement

Health Fund Code	Membership number	Your share of premiums paid	Your share of Aust Govt Rebate received	Benefit code	No of days covered by private hospital	No of days covered by extras cover	Other adult beneficiaries

**MEDICAL TAX OFFSET** – This offset has changed. Expenses you can claim are restricted to disability aids, attendant care or aged care.

Did you incur any expenses that relate to the above? If yes, amount paid \$

**Do you have a HECS/HELP debt** – YES OR NO

Do you have a Medicare exemption certificate – YES OR NO

**Zone Rebate** – did you live in any remote areas during the year (this must be your permanent place of residence you normal residential address)

Area /Town or closest Town	Dates

I hereby instruct you to prepare my Income Tax Return for year ended 30 June \_\_\_\_\_

I will be responsible for the accuracy and completeness of all information contained in the tax return.

**Payment Options**

**Once filled out save and email to: [wardstax@wardstax.com.au](mailto:wardstax@wardstax.com.au)**

One of our qualified accountants will be in contact with you shortly to confirm your estimated refund or any tax payable.

**Notes**

1. The ATO will automatically calculate the superannuation co-contribution you are eligible for and pay this directly into your superannuation account
2. The ATO can audit any taxpayers return so ensure that you have proof for all of your claims.