

Full Name:

Tax Year:

Phone Number:

Address:

Email Address:

**INCOME**

Please enclose all paperwork relating to your income

- PAYG Summary / Group Certificates  Centrelink income
- Bank Interest (include bank account details)  Rent from Rental properties
- Dividends or trust distributions  Share Sales & other Capital Assets
- Business Income - include summary  (Include purchase and sale documents)

**WORK RELATED EXPENSES**

Please supply how much you have spent on these items and include all paperwork

- Travel Expenses \$\_\_\_\_\_ Description \_\_\_\_\_
- Self-Education Expenses \$\_\_\_\_\_ Description \_\_\_\_\_
- Union Fee's \$\_\_\_\_\_ Description \_\_\_\_\_
- Income Protection Insurance \$\_\_\_\_\_ Description \_\_\_\_\_
- Seminar/conference expenses \$\_\_\_\_\_ Description \_\_\_\_\_
- Professional development \$\_\_\_\_\_ Description \_\_\_\_\_
- Computer and WIFI \$\_\_\_\_\_ Description \_\_\_\_\_
- Tools of the Trade \$\_\_\_\_\_ Description \_\_\_\_\_
- Protective Clothing/uniform \$\_\_\_\_\_ Description \_\_\_\_\_
- Occupation Specific purchases \$\_\_\_\_\_ Description \_\_\_\_\_
- Sun protection purchases \$\_\_\_\_\_ Description \_\_\_\_\_
- Laundry of work uniform Yes \_\_\_ No \_\_\_ (Items must be logo'd, occupation specific, protective or compulsory to be claimable)
- Rental Property Expenses E.G - rates, repairs & maintenance, interest on loans, insurance, agent fees
- Home Office - (working from home) Hours \_\_\_\_\_ p/w COVID-19 hours \_\_\_\_\_ p/w
- Work related phone usage Monthly Bill \$\_\_\_\_\_ percentage of work use \_\_\_\_\_ %
- Personal Super Contributions \$\_\_\_\_\_ Description \_\_\_\_\_

**OTHER DEDUCTIONS**

- Donations \$\_\_\_\_\_ Description \_\_\_\_\_
- Prior year Tax Agent Fee's \$\_\_\_\_\_ Description \_\_\_\_\_
- Interest Expenses \$\_\_\_\_\_ Description \_\_\_\_\_
- Travel to Tax Agent \_\_\_\_\_ Km's Description \_\_\_\_\_
- Motor Vehicle Expenses (applies if you use your motor vehicle for work related travel; not return travel from home to work)
  - Model \_\_\_\_\_
  - Registration \_\_\_\_\_
  - Log Book \_\_\_\_\_ %
  - Business Km's \_\_\_\_\_ km's
  - Odometer Reading \_\_\_\_\_ at 30th June

**OTHER IMPORTANT INFORMATION**

- Did you contribute to your Superfund? Please provide Superfund annual statement
- Do you have a spouse or defacto? Please include name, date of birth & taxable income
- Do you have private health insurance? Please enclose statement
- Do you have dependent children? Please include Names & dates of birth
- Please provide current Bank details BSB \_\_\_\_\_ ACC \_\_\_\_\_
- Do you have a MyGov Account? Yes/No



For further information please see the enclosed Six Step Guide - put together by your friendly team at Proactive Tax to help you get the best return every time!