

# Client Information

Please email your tax return information to: [admin@taxhut.com.au](mailto:admin@taxhut.com.au)

## DETAILS

Are you an Australian resident for income tax purposes? Yes No

Tax File Number (new clients only): Australian Business Number:

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

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

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

Date of Birth: \_\_\_\_\_ Contact Phone Number: \_\_\_\_\_

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

My preferred method of contact is: Email / Telephone

## Payment Instructions:

Please charge your fee to my credit card, my credit card details are listed below. Yes No

Please deduct your fee from my refund. I have read the client engagement letter and am aware that an additional fee of \$50.00 applies. Yes No

I will attend your office and pay in person. Yes No

I will pay by electronic funds transfer to your account. (Refer to our invoice for bank account details) Yes No

## Credit Card Details:

Name On Credit Card: \_\_\_\_\_

Credit Card Number: \_\_\_\_\_

Credit Card Expiry: \_\_\_\_\_ Credit Card CSV (last 3 digits) \_\_\_\_\_

## Upon Completion Of My Tax Return:

Please email to me for signing. (refer to email address above) Yes No

Please mail to me via Australia Post for signing: (refer to postal address above) Yes No

I will attend your office to sign. Yes No

## Bank Details:

Please deposit my refund into the bank account listed below:

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

Bank Account BSB: \_\_\_\_\_

Bank Account Number: \_\_\_\_\_

**Please Turn Over**

## Income:

Occupation: \_\_\_\_\_

**I am an (please circle):** \_\_\_\_\_ Employee      Self Employed      Retired / Not Working

### Employment Income:

If you are an employee, we can access your earnings if the employer has provided these details to the ATO.

Where possible please try and access your PAYG Payment Summaries and make available when we are preparing your income tax return.

If you are self employed, please provide details of income and expenses.

### Did you receive income from any of the following, if so please provide details:

Australian govt allowances and payments eg Newstart, youth allowance, austudy jobseeker, jobkeeper etc?	*	Yes	No
Australian govt pensions or allowances eg age pension, single parent payment?	*	Yes	No
Australian annuity and superannuation income streams?	*	Yes	No
Superannuation lump sum payments?	*	Yes	No
Interest eg bank account interest?	*	Yes	No
Dividends?	*	Yes	No
Shares in the employer company, eg employee share scheme	*	Yes	No
Distributions from partnerships or trusts, managed funds?	*	Yes	No
Income from carrying on a business?		Yes	No
Did you make a capital gain or loss on the sale of a capital asset eg shares or property?		Yes	No
Foreign Income, eg overseas pension, interest, rental income, dividends?		Yes	No
Rental property income and expenses? Please provide realestate agent summary, interest on loan council rates, water rates, insurance, strata levies, repairs etc		Yes	No
<b>Jobkeeper</b> As a self employed person or director of a company, have you received jobkeeper payments? If so, please provide amounts received.		Yes	No

\* We may have access to this via the Australian Taxation Office tax agent portal

**Please Turn Over**

**Deductions**

**Travel**

Do you use your own vehicle for employment related purposes? Yes      No

Travel to various sites as a result of your employment.

Travel between different sites of the employer.

Travel to carry out tasks for the employer.

Travel to visit clients / patients / consultants.

Attend meetings / courses at different sites

Incurred costs for airfares, taxis or accommodation to attend work related meetings / seminars.

If yes, please provide:

Reason for Travel:

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Vehicle Make:	Model:	Year:
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Do you wish to claim using the cents per km basis? If so please advise the approximate distance travelled (Annual) Km's

Have you maintained a log book for 12 weeks and wish to claim using the log book method?

If so please provide totals for the following:

Fuel	\$	Insurance	\$
Registration	\$	Repairs	\$
Interest on loan	\$	Other	\$

Log book percentage as per log book %

**Uniforms**

Do you wear a uniform or hi viz clothing at work that you wash yourself? Yes      No

Have you purchased steel cap boots, hi viz clothing or registered uniforms? Yes      No

If so, please provide the costs of each and ensure that you have a receipt to support the deduction claimed.

\$	\$
\$	\$

**Self Education**

Have you incurred expenses for work related study? Yes      No

eg apprentices, post graduate study directly related to your employment

If so, please provide:

Name of the course: \_\_\_\_\_

How does the course relates to your employment: \_\_\_\_\_

\_\_\_\_\_

Costs incurred eg course fees, travel to attend course, stationery etc

\$	\$
\$	\$

**Work Related Expenses:**

Have you incurred any of the following work related expenses:

Union Fees, memberships, subscriptions, tools of trade, stationery, internet, courses / training, computer expenses, police clearance, working with children, other, please list:

\$	\$
\$	\$
\$	\$

Please Turn Over



**Spouse Details:**

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

Spouse Date Of Birth: \_\_\_\_\_

Were You Together For Full Year: Yes      No

If not together for the full year please provide the period that you were together:

\_\_\_\_\_

Spouse Taxable Income: \$ \_\_\_\_\_

Number Of Dependant Children (living with you): \_\_\_\_\_ children

**Private Health Insurance**

Do you have private health insurance? Yes      No

If you have private health insurance we need a copy of the private health insurance annual tax statement.  
We can access this if your insurer has uploaded the statement to the ATO.

**Your tax return may not be accurate if we prepare your tax return without the annual tax statement.**

**Child Support**

Did you pay child support during the year? Yes      No

If yes,

How much maintenance did you pay this financial year? \$ \_\_\_\_\_

Number of children that you paid maintenance for: \_\_\_\_\_ children

**Other Notes / Queries:**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
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**Please email to:** [admin@taxhut.com.au](mailto:admin@taxhut.com.au)

**Please mail to:** Rockingham Tax Hut  
PO Box 392  
Rockingham WA 6968

**Please deliver to:** 1/11 Robinson Road, Rockingham WA 6168  
527 Canning Hwy, Melville WA 6156 (By prior arrangement)  
5/1200 Hay Street, West Perth WA 6005 (By prior arrangement)