

# 2017 Individual Tax Return Information

Please email, fax or post this form back to our office **PRIOR** to your appointment:

**EMAIL:** accountants@codenceaccounting.com.au

**FAX:** 07 3188 5157

<b>Full Name</b>			
<b>Tax File Number</b>		<b>Date of Birth</b>	
<b>ABN (if applicable)</b>		<b>GST Registered?</b>	<input type="checkbox"/> YES <input type="checkbox"/> NO
<b>Address</b>			
<b>Address (postal)</b>			
<b>Telephone Contacts</b>	<b>Mobile:</b>		
	<b>Business Hours (work):</b>		
	<b>After Hours (home):</b>		
<b>Email</b>			
<b>Bank Account Details</b> (for refund if applicable)	<b>Name of Account:</b>		
	<b>BSB:</b>		
	<b>Account Number:</b>		
<b>Occupation</b>			
	Do you run your own business as a sole trader? <input type="checkbox"/> YES <input type="checkbox"/> NO		
Do you run your own business in a company/trust/partnership? <input type="checkbox"/> YES <input type="checkbox"/> NO			
<b>Spouse's Full Name</b> (please indicate married/defacto/same sex)			
<b>Spouse's Date of Birth</b>			
<b>Spouse's Approx. Taxable Income</b>			
<b>Spouse's Tax Return to be Completed</b>	<input type="checkbox"/> YES <input type="checkbox"/> NO (If yes please complete a separate form)		
<b>Children (Dependents)</b>	<b>Name:</b>	<b>Date of Birth:</b>	
	<b>Name:</b>	<b>Date of Birth:</b>	
	<b>Name:</b>	<b>Date of Birth:</b>	
	<b>Name:</b>	<b>Date of Birth:</b>	

PLEASE NOTE OUR STANDARD PROFESSIONAL FEE FOR A SALARY & WAGE TAX RETURN IS \$275 (INCL. GST) PER PERSON, PLUS \$110 (INCL. GST) PER RENTAL PROPERTY OR OTHER INVESTMENT SCHEDULE

\_\_\_\_\_  
*Signature of Taxpayer*

\_\_\_\_\_  
*Date*

(If returned by email we will take the above information as being true and correct.)

## ***Documents to Bring In***

Below is a suggestion of the types of documents you will need to bring to our scheduled interview (if applicable)

- **Payment Summaries** (incl. Wages & Centrelink PAYG Statements)
- **Employment Termination Payment Summaries**
- **Australian Government Allowances** (Newstart, Youth Allowance & Austudy)
- **Bank statements** for interest income
- **Dividend statements**
- **Managed fund distribution statements**
- **Share Purchases/Sale documents** during the financial year
- Details of any participation in an **Employee Share (or option) Plan** or arrangement
- **Log book** for car (if used for business or work)
- **Summary of business kilometres travelled by car**
- **Relevant invoices/receipts for deductions** which may include; travel expenses, uniforms, protective clothing, self-education expenses, other work related expenses & donations.
- **Loan statements** for deductible interest (e.g. for purchase of rental properties and other income producing assets)
- **Rental Property** income and expenditure (including real estate agent annual statements)
- **HELP/ HECS** balances as at 30/06/2016
- **Private health fund details and tax statement**
- **Medicare and Private Health Fund expense** claim summaries
- **Child Support paid** for the financial year
- **Business records** where you conduct your own business
- Information relating to **any partnership or trust distributions** received during the year
- Details of any **superannuation withdrawals** (lump sum or pension)
- Copy of your **prior years Income Tax Return** (if not prepared by our practice)
- Invoice for fee charged for **previous year's tax return** preparation (if not from our practice)