

2019 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

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

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 30/06/2018
- **Private health fund details and tax statement**
- **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)