AVS Chartered Accountants
Adding value to your business
Business Advisors & SMSF specialists

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Information for your Individual Tax Return

for the year ended 30 June ....

Please complete part A and B then attach related documents with this form
Please provide your bank details as it is a requirement of the ATO
If you tick (√) information provided, please make sure you attach relevant documents

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PART A INDIVIDUAL INFORMATION

Title : ✔ Mr ✔ Mrs ✔ Ms ✔ Miss

Given names:

Surname or family name:

Daytime phone: After-hour phone:

Mobile phone:

Email address:

Electronic Funds Transfer Details - Nominated financial institution for a tax refund (required by the ATO)

Account name:

BSB: -

Account Number:

Disclaimer: These notes are intended to be a guide only. AVS Business Services,Partner, employees and consultants expressly disclaim any and all liability to any person, for the consequences of anything done or omitted to be done by any such person relying on a part or the whole of the contents. Do not act on the information without first obtaining specific advice regarding your particular circumstances from a tax professional.

PART B CHECKLIST

Information	Information Provided	Not Applicable
Income		
PAYG payment summaries (eg from employers)	☐	☐
Lump sum payments (eg employment termination payment)	☐	☐
Partnership distribution statement, and a copy of partnership's tax return	☐	☐
Trust distribution statement, and a copy of trust's tax return	☐	☐
Documentation regarding foreign source income, foreign assets or property	☐	☐
Bank statements stating interest earned, including for term deposits	☐	☐
Dividend statements	☐	☐
Employee share scheme statements	☐	☐
Managed fund annual tax statement and capital gains tax statement	☐	☐
Buy/sell contract notes for shares (if any shares were sold)	☐	☐

Notes : Income

Work related Deductions	Information Provided	Not Applicable
Details of depreciable assets bought during the year (eg laptops)	☐	☐
Details and receipts for home office expenses	☐	☐
Professional journals/trade magazines	☐	☐
Professional memberships/subscriptions	☐	☐
Receipts for continuing professional development courses and seminars	☐	☐
Receipts for self e-ducation expenses	☐	☐
Receipts for other work -related deductions such as protective clothing, uniform expenses, tools and equipment, and travel	☐	☐
Vehicle logbook for motor vehicle expenses (if using the logbook method) or estimate of business use, estimate of business kilometres	☐	☐

Please turn to next page to work-related deductions notes

Notes : Work related deductions

Other Deductions	Information Provided	Not Applicable
Receipts for donations of $2 and over to registered charities	☐	☐
Expenditure incurred in managing tax affairs (eg tax agent's fees)	☐	☐
Expenditure incurred in earning interest, dividend and other investment income (eg investment advice fees)	☐	☐
Income protection insurance premium	☐	☐

Notes - Other Deductions

Rental Properties	Information Provided	Not Applicable
Period property was rented out during the income year	☐	☐
Records detailing rental income (annual statement from property agent, if engaging services of an agent)	☐	☐
Loan statements for property showing interest paid for the income year	☐	☐
Expenses incurred such as water charges, council rate, land tax and insurance premiums	☐	☐
Details of depreciable assets bought or disposed of during the year	☐	☐
Details of any capital works deductions (depreciation schedule) on the property	☐	☐
If the property was disposed of during the income year, information relating to dates and costs associated with the disposal of the property	☐	☐

Notes: Rental Property

Offsets/Rebates	Information Provided	Not Applicable
Details of any superannuation contributions for spouse	☐	☐
Details of medical expenses where the total exceeds $2,218 after Medicare and private health fund rebates) *To eligible to this tax offset, you must have claimed it in the prior year*	☐	☐
Details of income dependants	☐	☐
Private health insurance statement (and details of prepaid premiums)	☐	☐

Notes :Offsets/Rebates

If Operating As a Sole Trader	Information Provided	Not Applicable
Cashbook, which includes records of drawings taken before the business takings were banked	☐	☐
Copies of Business Activity Statements lodged	☐	☐
Copies of PAYG summaries for employees	☐	☐
Details of any government grants, rebates or payments received	☐	☐
Details of superannuation contributions for employees	☐	☐
Details of any assets purchased, including date of purchase and amount	☐	☐
Payments of salaries and superannuation to associates	☐	☐
Records from accounting software (eg trial balance, profit and loss (P&L) and balance sheet)	☐	☐
Statements of all liabilities of the business	☐	☐
Notice of superannuation contributions for self employed persons	☐	☐
Accounting or bookkeeping file in MYOB, Xero, QuickBooks, Excel, etc.	☐	☐

Notes : If operating as a sole trader

Superannuation

A) Are you self-employed or retired, if yes please provide details of contributions you made to your superannuation for the financial year.

B) Have you made any personal contributions to your superannuation fund? If so you may be entitled to super co- contributions (conditions apply). We do not require any information for your tax return as the process to claim this is automatic between the Australian Taxation Office and your superfund upon lodgement of your tax return.

C) Have you made superannuation contributions on behalf of your spouse?

HELP Debt / Student Loans:

Do you have a student loan?

If yes, please attach statements for the year to enable us to check the repayment.

CapitalGain :

Did you sell any assets such as shares or property which was acquired after 20 September 1985?

Applicable? ○ Yes ◉ No

If yes then please provide relevant documents

Other Information	Information Provided	Not Applicable
Copies of Instalment Activity Statements lodged	☐	☐
Any other information that you think is relevant	☐	☐

Notes : General Information

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