

2010 personal income tax return questionnaire

to:



i: _____

internal checklist	
job setup	
engagement letter on file	
ato prefill	
postal address	
part b	
signed questionnaire	
signed eld	
estimate	
amount	
net refund	
account paid	
hold lodgement	
lodged	
records scanned	

instructions

hereby instruct you to prepare my taxation return for the financial year ended 30 june 2010.

undertake to supply all information necessary to carry out such services and will be responsible for the accuracy and completeness of such information.

advise that if an answer to a question or any statement made in an income tax return or an attached schedule appears to be incorrect, incomplete or misleading, i will provide the information needed to amend the return.

agree that i shall be personally liable for all fees for services performed in accordance with such engagement and understand that payment or arrangements must be made before lodgement of the return.

how would you like your copy for your records?

- electronic pdf file
- printed paper return
- printed summary

how will you pay of our fee

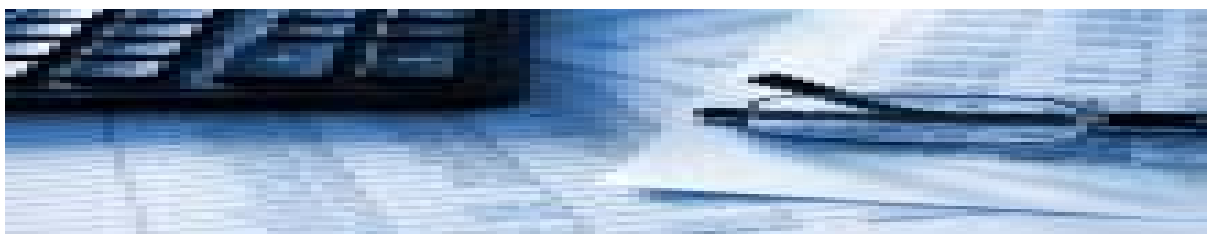
- direct payment – bpay, credit card, cash, cheque
- deduct from refund
- from other entity

how would you like your refund? if applicable

- cheque
- deposited into bsb no

_____ please print & sign this page

_____ date:



your details

please check last years return Front Cover details & advise if any details have altered

income

did you have any?

if yes please

salary & wages		attach payment summaries
allowanances, earnings, tips, directors fees		attach details
employer lump sum or termination payments		attach payment summaries
pension, annuities & benefits		attach payment summaries
business		complete accounts checklist
interest		attach details
dividends		attach dividend advices
managed investments		attach tax summaries
foreign income		attach details
sales of assets		attach details
rental income		complete rental checklist
other income		attach details

deductions

did you have any?

if yes please

Work Related Expenses		Complete Work Expenses Checklist
Motor Vehicle		
Travel		
Work Related Clothing		
Other Work Related Expenses		
Income Protection Insurance		Attach Details
Personal Superannuation Contributions		Attach Details
Gifts or Donations		Attach Details
Tax Agent Fees		Attach Details
Other Deductions		Attach Details

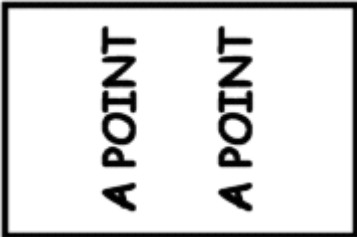


other information			
your spouse			
name	date of birth	taxable income	no of dependants
education tax offset			
description		amount	description
laptops			home internet
home computers			printers
education software			school books
trade tools (school use)			stationery
student name	primary or secondary	eligible days	agreed % shared %
superannuation co-contribution			
fund name		fund tfn	
account number		amount paid	
superannuation contributions paid on behalf of spouse			
fund name		fund tfn	
account number		amount paid	
other – please provide details			
did you have private health insurance?			
do you have a help/hecs debt			
are you exempt from paying medicare levy?			
did you pay medical expenses in excess of \$1,500?			
did you live in a remote area of australia?			
area	no of days	area	no of days

any other information

your annual financial physical

do you have tax deductible income protection insurance?	
do you have a will that is up-to-date & accurately reflects your current wishes?	
do you have adequate life cover to protect your dependants?	
do you have adequate cover should you be incapacitated for some time?	
are you happy with your current home loan?	
are you happy with your personal investment plan?	
when do you want to retire? <input type="checkbox"/> now <input type="checkbox"/> never <input type="checkbox"/> age	
do you have adequate provision for your retirement?	
would you like to discuss any of the above with us or our associates?	

thinking outside the square

		
a _____	a _____	a _____

thank you for completing this questionnaire