Full Name: Tax Year: Phone Number:

Address: Email Address:

INCOME
Please enclose all paperwork relating to your income

PAYG Summary / Group Certificates	☐	Centrelink income	☐
Bank Interest *(include bank account details)*	☐	Rent from Rental properties	☐
Dividends or trust distributions	☐	Share Sales & other Capital Assets	☐
Business Income - include summary	☐	*(Include purchase and sale documents)*	

WORK RELATED EXPENSES
Please supply how much you have spent on these items and include all paperwork

Travel Expenses $_____ Description _____

Self-Education Expenses $_____ Description _____

Union Fee's $_____ Description _____

Income Protection Insurance $_____ Description _____

Seminar/conference expenses $_____ Description _____

Professional development $_____ Description _____

Computer and WIFI $_____ Description _____

Tools of the Trade $_____ Description _____

Protective Clothing/uniform $_____ Description _____

Occupation Specific purchases $_____ Description _____

Sun protection purchases $_____ Description _____

Laundry of work uniform   Yes___No_____ *(Items must be logo'd, occupation specific, protective or compulsory to be claimable)*

Rental Property Expenses   *E.G - rates, repairs & maintenance, interest on loans, insurance, agent fees*

Home Office - *(working from home)*   Hours_____ p/w

Personal Super Contributions $_____ Description

OTHER DEDUCTIONS

Donations $_____ Description _____

Prior year Tax Agent Fee's $_____ Description _____

Interest Expenses $_____ Description _____

Travel to Tax Agent   _____ Km's Description

Motor Vehicle Expenses *(applies if you use your motor vehicle for work related travel; not return travel from home to work)*

      Model   _____

      Registration   _____

      Log Book   _____ %

      Business Km's   _____ km's

      Odometer Reading   _____ at 30th June

OTHER IMPORTANT INFORMATION

Did you contribute to your Superfund?   Please provide Superfund annual statement

Do you have a spouse or defacto?   Please include name, date of birth & taxable income

Do you have dependent children?   Please include Names & dates of birth

Please provide current Bank details   BSB_____ ACC _____

For further information please see the enclosed Six Step Guide - put together by your friendly team at Proactive Tax to help you get the best return every time!