



Tax, Accounting and Super Centre

www.tascentre.com.au

Mount Isa Qld: 07 4743 6342

Parap NT: 08 8941 3900

Dear Client

RE: YOUR TAX RETURN

Please note we require the following information to complete your Income Tax Return. Please inform us at your earliest convenience: (NB please list anything else you consider may be relevant as following questions are very general in nature)

BELOW ARE FOR THE TAX YEAR 1 JULY TO 30 JUNE

Where your answer to a question below is affirmative or YES, please send details.

1. What is your full Name?
2. What is your date of birth?
3. What is your full home address?
4. What is your postal address (if different from home address)?
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5. What is your contact Telephone number(s)
Mobile
Fax number
6. What is your email address?@.....
7. What was your occupation during the year?
8. Account details for deposit of refund (please write neatly)
BSB
Account Number
Account Name
9. Please provide copies of PAYG Payment Summaries (Group Certificates), did you receive any other income other than the group certificates provided and anything else detailed below for the period 1 July to 30 June? If so please provide details.

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10. **Did you receive any Centrelink benefits?** Any unemployment, pensions, Abstudy, Austudy or CDEP, please send statements from Centrelink. YES / NO

11. Have you had income from business/partnership or a rental property? YES / NO

12. Have you received any interest in your bank accounts? \$ YES / NO

13. Do you have any work related expenses? I.e.: Tools, uniforms (Jeans only if logo'd) etc. If so, how much? And Provide details of the items you want to claim.

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14. Did you use your own Motor Vehicle for work related travel expenses? (Note: Trips between work and home are *excluded* unless carrying bulky equipment that cannot be securely stored at work) YES / NO

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15. Did you have any other work related travel expenses? YES / NO

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16. Did you contribute to your own or your spouse's superannuation fund? YES / NO

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17. Have you made any donations? YES / NO

18. Did you pay to have your tax completed last year? If so how much? And where? (Not required if completed with TASC) YES / NO

19. Did / do you have a spouse or partner for any part of the period 1 July to 30 June? If so we require their full name & date of birth and dates you were together if not full year and ALL their income details also. YES / NO

If Yes: Spouse Full Name
Spouse date of birth
Dates you were together if not full year

Spouses income details (not Family Tax Benefit) but include other Centrelink details

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20. Do you have any dependent children? YES / NO
If so we require their full names & dates of birth AND income (if any)

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21. Do you or your spouse receive the family tax benefit? (Amounts not required) YES / NO

22. Where have you lived for the past financial year? (1 July – 30 June). Have you traveled to anywhere more remote and stayed the night? YES / NO

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23. Are you in a Private Health Fund? (Not Medicare)? If so please SEND us a copy of the annual statement they will send to you. YES / NO

24. Do you owe any money for HECS, supplementary loans or Child Support or any other government department? YES / NO

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25. Have you paid child support during the year? YES / NO
If Yes approximately how much \$.....

24. How do you wish to pay our fees? (Note before there are additional charges for Fee From Refund and Credit Card) (Please circle one)

FEE FROM REFUND (\$25 extra) / CREDIT CARD (2.0% surcharge) / MONEY ORDER / CASH.

Please note other than for the Fee for Refund Option, our fee will be required to be paid prior to lodgment).

If you have any queries in regards to the above, please do not hesitate to contact us at our office on (07) 4743 6342.

Yours faithfully

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