

2011 Personal Tax Return Instructions

Your Last Name			
Your Given Names			
Residential Address (if different to postal address)			
Your Occupation			
Work Phone No			
Mobile Phone No			
Home Phone No			
Fax No			
Email Address			
Contact Me During Normal Office Hours	<input type="radio"/> At Home	<input type="radio"/> At Work	<input type="radio"/> On Mobile
Please provide your bank account details for eft refund purposes	BSB		Acct No
	Account Name		
Send a copy of my completed return by	<input type="radio"/> Fax	<input type="radio"/> Email	<input type="radio"/> Post <input type="radio"/> I will Collect

Your Family

Spouse Surname, if different (incl same sex couples)			
Spouse Given Names			
Did you have a Spouse for the Full Year?	<input type="radio"/> Yes	<input type="radio"/> No	
If no, period you had a spouse	From		To
Spouse Date of Birth			
Spouse Income (but we prefer a copy of the return)		Dependent Children's Details (if applicable)	
Taxable Income		Name	Date of Birth
Govt Pensions & Allowances			
Exempt Pension Income (spouse)			
Exempt Pension Income (you)			
Reportable Fringe Benefits			
Reportable Super Contributions			
Net Investment Loss			
Child Support (paid) by spouse			
Child Support (paid) by you			

Income

Did you receive Payment Summaries?		<input type="radio"/> Yes	<input type="radio"/> No
<p>If no, go to question 2.</p> <p>If yes, we need copies of all payment summaries for wages, lump sum payments (both employer & superannuation), Government pensions & allowances and superannuation pensions. For superannuation pensions, we also need any letter(s) and schedule(s) sent to you by the provider with your payment summary.</p>			
2. Did you receive Interest from Banks?		<input type="radio"/> Yes	<input type="radio"/> No
<p>If no, go to question 3.</p> <p>If yes, record details below showing total interest received on each account or provide bank statements etc.</p>			
Name of Bank	Account No	<u>Total</u> Interest	Tax Withheld
			No of Holders

3. Did you receive Dividends from Shares held? <input type="radio"/> Yes <input type="radio"/> No					
<p>If no, go to question 4. If yes, read on and fill in the details below with total dividends received or send all dividend statements.</p> <p>NB 1 Dividends reinvested must be declared as income, even though you didn't receive any money. NB 2 Dividends are assessable in the year of payment. Look for date of payment on the dividend statements.</p>					
Company	Unfranked	Franked	Imp Credit	Tax Withheld	No of Holders
4. Did you receive Distributions from Managed Funds? <input type="radio"/> Yes <input type="radio"/> No					
<p>Managed funds are investments in unit trusts such as BT, Colonial, MLC etc</p> <p>If no, go to question 5. If yes, we need annual tax statements.</p>					
5. Did you Sell any Assets? <input type="radio"/> Yes <input type="radio"/> No					
<p>If you sold assets such as shares or property which were acquired after 20 September 1985, you may have to pay capital gains tax (cgt). Your main residence is exempt from cgt providing it was never used to produce income.</p> <p>If no, go to question 6. If yes, we need documents which show dates and amounts for purchase, sale and incidental costs. For managed funds, we need the cgt statement from the fund manager or documents showing cost and sale amounts for all units sold.</p>					
6. Did you receive Rental Income? <input type="radio"/> Yes <input type="radio"/> No					
<p>If no, go to question 7. If yes, we need a summary of income and expenses for each rented property or the agent's annual or monthly statements and a summary of expenses paid by you direct.</p> <p>Also, send loan statements or advise amount of interest paid on any loan to buy each property. Also, send solicitor's letter and quantity surveyor's report if the property was purchased during the year.</p>					
7. Did you receive any Other Income not referred to above? <input type="radio"/> Yes <input type="radio"/> No					
<p>If no, go to question 1 under Deductions. If yes, attach details. Other income could include foreign income or pensions, distributions from partnerships and/or trusts, income from your own business, bonuses from life insurance companies or friendly societies, income from forestry managed investment schemes and discounts on shares and rights acquired under an employee share scheme (including prior year discounts where "cessation time" occurs this year). If you have business income, you will also need to provide us with either your cashbook or a summary of income and expenses, including GST calculations if you are a GST-registered business.</p>					

Deductions

VIP If your total work-related expenses exceeds \$300 (excl car expenses and claims against certain allowances) **you must have receipts** to prove the total amount, not just the amount over \$300.

1. Did you use your Car for work and keep a Log Book? <input type="radio"/> Yes <input type="radio"/> No					
<p>If no, go to question 2. If yes, you are entitled to claim the cost of using your car for work based on a log book kept for a continuous period of 12 weeks within the last five years.</p> <p>Insert details of your car and expenses incurred here and go to question 3.</p>	Make	Model			
	Date Purchased		Business Use (%)		
	Cost		Year Log Book Kept		
	Petrol & Oil		Interest Paid		
	Registration		(send loan or lease agreement if this is the first year claimed or you are a new client)		
	Insurance		Services		
	Registration		Tyres & Batteries		
	Repairs				

	Lease Payments			
2. Did you use your Car for work and NOT keep a log book? <input type="radio"/> Yes <input type="radio"/> No				
<p>If no, go to question 4. If yes, insert the details of your car here and go to question 3.</p> <p>VIP You must exclude trips between home and your normal place of work (some exceptions do apply to this rule – contact our office for more details)</p>	Make	Model		
	Engine Size (litre)		Cost of Car	
	Business Kms		Expenses This Year	
	<p>You are entitled to claim the cost of using your car for work based on a <u>reasonable estimate</u> of the kilometres travelled up to a maximum of 5,000kms per car. As an alternative, you can claim either 12.5% of the cost of your car or one third of expenses paid if you travel more than 5,000 kms. Use question 1 to estimate exps.</p>			
3. Tell Us How You Used Your Car for Work Here:				
4. Did you have Work-related Travel Expenses? <input type="radio"/> Yes <input type="radio"/> No				
<p>If no, go to question 5 If yes, record details here.</p>	Taxis		Meals	
	Buses		Accommodation	
	Trains		Airfares	
	Parking			
	Car Hire			
5. Did you have Work-related Clothing Expenses? <input type="radio"/> Yes <input type="radio"/> No				
<p>If no, go to question 6 If yes, record details here. Please note that you cannot generally claim a deduction for conventional clothing.</p>	Compulsory Uniform		Dry Clean Uniforms	
	Non-Compulsory Uniform		Home Laundry	washes/wk
	Occupation Specific		Home laundry of uniforms or protective clothing only. Not conventional or everyday clothing	
	Protective Clothing		Sun Hats	
	Non-Slip Shoes			
6. Did you have Work-related Self Education Expenses? <input type="radio"/> Yes <input type="radio"/> No				
<p>If no, go to question 8. If yes, you can claim expenses that related to your work as an employee at the time you were studying.</p> <p>If your self-education was to help you get a new job, you cannot claim your expenses. If you satisfy these conditions, complete these details and go to question 7.</p>	Course Description			
	Name of School, College or University			
	Date Commenced			
	Date Finished			
	Fees (not HELP)		Home Office	Hrs/Week
	Text Books		Home Office	Weeks
	Stationery		Kilometres Travelled*	
	Photocopying		Description of Car	
	Student Union		Engine Capacity	Litre
	<p>You can claim the kilometres travelled directly between home or work and your place of education and return. If you travel from home to your place of education and on to work or from work to your place of education and home, only claim the first leg of each trip.</p>			
7. Tell Us How Your Course is Work-Related Here				
8. Did you have any other Work-Related expenses? <input type="radio"/> Yes <input type="radio"/> No				

<p>If no, go to question 9 If yes, enter total expenses (before private use if any) on the right and indicate below the proportion of work use of those items also used for private purposes. Also, enter below that, equipment costing more than \$300 per item.</p>	Computer Software		Safety Equipment	
	Computer Supplies		Stationery	
	Conferences/Seminars		Subscriptions	
	Home Office	hrs/week	Sun Screen/Glasses	
	Internet Access (total)		Telephone - home	calls/wk
	Meal allowance rec'd	/meal	Telephone – mobile	
	Meal allowance spent	/meal	Tools (<\$300/item)	
	Office Equip(<\$300/item)		Union Fees	
	Postage			
	Professional Fees			
	Ref Books/Journals			
	Repairs			

Work-Related Equipment Purchased Costing More than \$300	Work & Private Use Items
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Description	Cost	Date of Purchase	Work Use %	Item	Work Use %
				Computer	
				Internet Access	
				Mobile Phone	

9. Did you pay Interest on Investment Loans (excl rental properties)? Yes No

<p>If no, go to question 10 If yes, complete these details.</p>	Description of Investment	Interest Paid

10. Did you donate to charities or school building funds? Yes No

<p>If no, go to question 11 If yes, complete these details or attach a list.</p>		

11. Do you have any Other Deductions not referred to above? Yes No

<p>If no, go to Q1 at Tax Offsets. If yes, complete these details. If you are claiming a deduction for personal superannuation contributions, the fund must give you a written acknowledgement of your intention to claim.</p>	Income Protection Insurance	
	Tax Return Fee Last Year (if not prepared by us)	
	Personal (deductible) Superannuation Contributions	

Tax Offsets

1. Do you have Private Patient Hospital Cover? Yes No

If no, go to question 3.
If yes, we need your private health insurance statement, and go to question 2.

2. If you have Private Patient Hospital Cover, were all of your Dependants (including your Spouse if applicable) covered for the whole of the year? Yes No N/A

Medicare levy surcharge may be payable if you or your dependants (including your spouse) do not have an appropriate level of private patient hospital cover for the whole of the year.

3. Did you incur Eligible Education Expenses (see below) during the year? Yes No

<p>If no, go to question 4. If yes, you can claim a refund of expenses listed here for <u>primary or secondary school</u> studies (at school, home or TAFE) by a child or yourself if you were an independent student under 25.</p>	Child/Student Name				
	Attended school or rec'd home schooling for at least 1 day (otherwise no claim) -				
	01/07/10 - 31/12/10	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No
	01/01/11 – 30/06/11	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No
	Computer – laptop				

<p>Only include expenses incurred -</p> <p>1. When you were eligible to receive Family Tax Benefits (FTB) for that child; or</p> <p>2. When you did not receive FTB for that child only because the child was paid amounts such as Youth Allowance, Disability Support Pension, ABSTUDY living allowance or a prescribed educational scheme payment; or</p> <p>3. The child was 16 years or older, attended school for at least one day during the year, was not at school on 30/06/10 and conditions 1 & 2 above were not satisfied because of the child's income.</p>	Computer – desktop			
	Printer			
	Repairs to above			
	Computer Software			
	Internet connection			
	Stationery			
	Textbooks			
	Tools (school apprentice)			
<p>4. Did you contribute to Super for your Spouse? <input type="radio"/> Yes <input type="radio"/> No</p>				
<p>If no, go to question 5. If yes, insert details here.</p>			<p>Contribution \$</p>	
<p>5. Did you live in a remote area of Australia or serve overseas? <input type="radio"/> Yes <input type="radio"/> No</p>				
<p>If no, go to question 6. If yes, insert details here</p>	Location	Period From	Period To	
<p>6. Did you spend more than \$2,000 on Medical Expenses after Rebates? <input type="radio"/> Yes <input type="radio"/> No</p>				
<p>If no, go to question 7. If yes, show total out-of-pocket expenses for whole family here.</p> <p>Medical expenses include payments for doctors, nurses, hospitals, chemists, dentists, optometrists, therapeutic treatment at the direction of a doctor, medical aids prescribed by a doctor, artificial limbs, eyes & hearing aids, treatment under an in-vitro fertilisation program and payments made to a nursing home or hostel but not a retirement home. Exclude cosmetic items.</p>			<p>Out-of-Pocket Medical Expenses</p> <p style="margin-top: 20px;">\$</p>	
<p>7. Do you have a HELP or SFSS Debt? <input type="radio"/> Yes <input type="radio"/> No</p>				
<p>If yes, insert amount(s) owing here.</p>			<p>HELP bal at 30 June \$</p> <p>SFSS bal at 30 June \$</p>	
<p>8. Please write here any other information about your return</p> 				
<p>Please sign and date below.</p> <p>_____</p>				
<p>Signature</p>		<p>Date</p>		