Individual Tax Return Questionnaire



Year Ended 30th June 201_ (Enter Year)

Here's a checklist to help you gather the receipts, tax invoices and supporting documentation you'll need to do your tax return. You may email or post this prior to your appointment. Feel free to contact us if you have any queries

TO: PFG Accountants & Advisors

| ATTENTION: | | E-MAIL: | info@pfgaccountants.com.au |
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| INFORMATION FOR TAX RETURN | | | | | | | | | | | | |
|---|---|--|-----------------|------------------------------------|-----------------|--|---|--|-----------------|------------------------------|--|--|
| Name: | | | | | Spouse Name: | | | | | | | |
| DOB: | | | | | Spouse DOB: | | | | | | | |
| Address: | | | Postal | | Postal Address: | ostal Address: | | | | | | |
| TFN: | | | | | Email: | | | | | | | |
| Phone: | W | | | | | | м | | | | | |
| CHILDREN | | | <u>I</u> | L | L | | | 1 | L | | | |
| Name: N | | | | | Name: | ame: | | | | | | |
| DOB: | | | | DOB: | | | | | | | | |
| School: Primary/Secondary | | | School: | | School: | | Primary/Secondary | | | | | |
| Education Costs: | | | Edu | | ducation Costs: | | | | | | | |
| Name: | | | | | | Name: | | | | | | |
| DOB: | | | | | | DOB: | | | | | | |
| School: | Prim | ary/Secondary | | | School: | | Primary/ | Secondary | | | | |
| Education Costs: | | | | Education | | | :: | | | | | |
| PAYG PAYMENT SUMMARIES (Please Attach or Fax All Slips) | | | | | | | | | | | | |
| Emplo | oyer: | | Occupation: | | | on: | | Gross: | | Tax: | | |
| | | | | | | | \$ | | | \$ | | |
| | | | | | | \$ | | | \$ | | | |
| | | | | | | \$ | | | \$ | | | |
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| BANK INTEREST Bar | nk: | | | | Amoun | t: | | TFN Cr | edits: | Bank Charges: | | |
| | nk: | | \$ | | Amoun | t: | | TFN Cr | edits: | Bank Charges: | | |
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| | | ch Detailed Listing) | | | Amoun | t: | | TFN Cr | edits: | Bank Charges: | | |
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