

# Individual Tax Return Questionnaire

Year Ended 30<sup>th</sup> 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](mailto:info@pfgaccountants.com.au)

## INFORMATION FOR TAX RETURN

Name:				Spouse Name:			
DOB:				Spouse DOB:			
Address:				Postal Address:			
TFN:				Email:			
Phone:	W		H		M		

## CHILDREN

Name:				Name:			
DOB:				DOB:			
School:	Primary/Secondary			School:	Primary/Secondary		
Education Costs:				Education Costs:			
Name:				Name:			
DOB:				DOB:			
School:	Primary/Secondary			School:	Primary/Secondary		
Education Costs:				Education Costs:			

## PAYG PAYMENT SUMMARIES (Please Attach or Fax All Slips)

Employer:	Occupation:	Gross:	Tax:
		\$	\$
		\$	\$
		\$	\$

## BANK INTEREST

Bank:	Amount:	TFN Credits:	Bank Charges:
	\$		
	\$		

## WORK EXPENSES (Please Attach Detailed Listing)

Work related tools:	\$	Self Education:	\$
(Eg. - tools of trade, calculators, electronic organisers, tablets, software)		(Eg. - course fees, student union fees, tutorial fees, text books, etc.)	
Details of Allowances Rec'd		Seminars/Prof Dev:	\$
Work Kilometres*	Refer separate form (see below)	Stationery:	\$
Taxi Fares:	\$	Uniform:	\$
Other Travel:	\$	Union Fees:	\$
Books or Trade Journals:	\$	Sun Protection Items:	\$
Income Protection Insurance :	\$	Other : (Please detail)	

## OTHER EXPENSES (Please Attach Detailed Listing)

Donations	\$	Tax Agent Fees :	
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Please note : Out of pocket medical expense claims are restricted to net eligible expenses for disability aids, attendant care or aged care from 1/7/2015 until 30/6/19

### DO YOU HAVE ANY OF THESE ITEMS?

Investment Income       Rental Properties

Eligible Home Office Expenses

Investments Sold       Motor Vehicles Used for Work

If so, then please download additional forms from

<http://pfgaccountants.com.au/our-resources/useful-links-and-forms/>