

Individual Tax Return Questionnaire

Year Ended 30th June 20__ (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

ACCOUNTANTS WHO THINK OUTSIDE THE BOX

TO: JTU Accounting Group

ATTENTION: _____ E-MAIL: admin@jtu.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

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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DO YOU HAVE ANY OF THESE ITEMS?		<input type="checkbox"/> Eligible Home Office Expenses	
<input type="checkbox"/> Investment Income	<input type="checkbox"/> Rental Properties	<input type="checkbox"/> Investments Sold	<input type="checkbox"/> Motor Vehicles Used for Work

If so, then please download additional forms from <http://jtu.com.au/our-resources/useful-links-and-forms/>