

Basic Personal Income Tax Checklist

YOUR NAME

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MAIN OCCUPATION IN 2011/2012

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ADVISE CHANGES IN CONTACT DETAILS

Residential address

	<i>Postcode</i>	

Telephone (W)

--

Telephone (H)

--

Postal address

	<i>Postcode</i>	

Mobile

--

Fax (W)

--

Email

--

Fax (H)

--

ADVISE CHANGE IN CIRCUMSTANCES (eg: marriage, separation, new family member etc)

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Do you want to use Electronic Funds

*Transfer for your refund? Please
provide your bank account details*

BSB	
Account Number	
Account Name	

ENGAGEMENT TO COMPLETE TAX RETURN

I appoint Fang Miao Registered Tax Agent as my tax agent. The Agent is authorised to complete my tax return and act on my behalf in taxation matters.

To the best of my knowledge, the disclosures made in the attached checklist and in any other supporting information provided to complete my tax return for the year ending 30 June 2012 are full and complete. I acknowledge that if asked by the Australian Taxation Office I hold all necessary information to substantiate my claims.

I understand that I will need to retain all documents including log books to prove my claims for up to five years from the issue of the notice of assessment.

Signature

/ /

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Are you an Australian resident for tax purposes – please contact us if unsure?

Yes ☐ No ☐

Have you paid PAYG instalments (formerly provisional tax) for 2011/2012?

Yes ☐ No ☐

Do you have a HELP (HECS) or Financial Supplement loan with the Commonwealth?

Yes ☐ No ☐

Did you receive PAYG Payment Summaries for salary, wages, paid parental leave, workers comp, foreign employment income, income protection policy payments, etc. **Please provide ALL?**

Yes ☐ No ☐

Do your PAYG Payment Summaries include paid parental leave?

Yes ☐ No ☐

Did you receive allowances, tips, Directors Fees, FBT, etc?

Yes ☐ No ☐

Did you receive Employer Lump Sum Payments?

Yes ☐ No ☐

Did you receive Employment Termination Payments?

Yes ☐ No ☐

Did you receive Taxable Australian Government Allowance/Payments – eg Newstart?

Yes ☐ No ☐

Did you receive Taxable Australian Government Pensions or Taxable Allowances?

Yes ☐ No ☐

Did you receive Australian Annuities, Superannuation or other Income Stream – (Taxable)?

Yes ☐ No ☐

Did you receive Australian Superannuation Lump Sum Payments?

Yes ☐ No ☐

Did you receive interest on bank or other deposits during the period 1/07/2011 to 30/06/2012?

Yes ☐ No ☐

If yes, please provide the following details: (Note: TFN - Tax File Number withholding tax where your bank does not have your TFN)

Bank	Account Number	Joint Account				\$Interest	\$TFN Tax	Please show the <u>full</u> amount of interest received, ie not just your share
		Yes		No				
		Yes		No				
		Yes		No				
		Yes		No				
		Yes		No				

Did you receive cash dividends from share investments or re-invested dividends (DRP)?

Yes ☐ No ☐

Did you receive from your employer, employee share rights, options or shares?

Yes ☐ No ☐

Did you receive income from a partnership or a trust (eg: Managed Funds)?

Yes ☐ No ☐

Will *Personal Services Income* be attributed to you from a company, partnership or trust?

Yes ☐ No ☐

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Did you have a rental property during the year? Please provide full rental schedules.

Yes ☐ No ☐

Did you run a business as a sole trader at anytime during the year?

Yes ☐ No ☐

Do you have deferred non commercial business losses?

Yes ☐ No ☐

Did you sell any assets? (eg: shares, mgd funds, real estate) *Attach buy, sell, DRP details etc for each asset*

Yes ☐ No ☐

Did you receive foreign income or pension – not from employment?

Yes ☐ No ☐

Did you at any time during the year hold foreign assets over \$50,000 or sell foreign assets?

Yes ☐ No ☐

Did you receive income from a Forestry Managed Investment Scheme?

Yes ☐ No ☐

Other income – please specify?

Yes ☐ No ☐

WORK RELATED EXPENSES PLEASE
PROVIDE FULL DETAILS OR RECEIPTS

Provide details for any of the following work related expenses

- Work related motor vehicle (do not include travel to and from work).

Yes ☐ No ☐

➤ **Either** Kilometres travelled (max 5,000) and the motor vehicle's engine size, _____ kms, _____ litres

➤ **Or** 12 week business use log book percentage, **Log book** _____ % **AND**

Expense details eg: petrol, repairs, CTP, rego, vehicle cost, interest on loan, etc.

- Other travel expenses including overseas travel - Please provide diary/itinerary evidence.

Yes ☐ No ☐

- Work related protective wear (eg laundry, uniform, occupation specific clothing, sunscreen).

Yes ☐ No ☐

- Work related self-education expenses to earn current (not future) income.

Yes ☐ No ☐

- Other work related expenses (eg union fees, professional memberships, home office etc).

Yes ☐ No ☐

WRE claims made without receipts & which exceed \$300 in total will be refused by the ATO in an audit

Did you incur costs to earn interest or dividend income?

Yes ☐ No ☐

Did you make gifts or donations to registered organisations?

Yes ☐ No ☐

Did you incur costs in managing your tax affairs?

Yes ☐ No ☐

Did you have income protection insurance?

Yes ☐ No ☐

Did you invest in the Australian Film Industry?

Yes ☐ No ☐

Do you have carry forward income losses or capital losses?

Yes ☐ No ☐

Are you entitled to claim a reduction of the medicare levy or hold an exemption certificate?

Yes ☐ No ☐

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Are you entitled to claim a reduction for the flood levy?

Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
Yes	<input type="checkbox"/>	No	<input type="checkbox"/>

Did you maintain a parent, spouse's parent, invalid spouse, carer spouse or invalid relative?

Did you make a personal super contribution to gain the Government co-contribution?

Did you make a personal tax deductible contribution to super and hold a s.290-170 certificate?

Did you make super contributions for your spouse? (if spouse income less than \$13,800)

If yes, please provide full details including the fund ABN _____ and amount \$ _____

Have you received a tax free Government pension? Please provide details.

Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
Yes	<input type="checkbox"/>	No	<input type="checkbox"/>

Have you received any form of income from overseas including gifts of allowances in cash or kind?

Did you pay amounts or provide child support benefits to another person for child maintenance?

PRIVATE HOSPITAL INSURANCE

Question A: For all or part of 2011/2012, did **you or your spouse** have Private **Hospital** Insurance?

Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
Yes	<input type="checkbox"/>	No	<input type="checkbox"/>

Question B: Did the Private Hospital Insurance Policy cover **you and all your dependants**?

Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
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Note : Your dependants include your spouse, children under 21 years old and children under 25 who are full time students

If you answered yes to either question It is essential you provide the Tax Statement issued by your Health Insurance provider.

If you answered no to either question Please provide full details of your spouse's private hospital policy and a copy of your spouse's PAYG Payment Summaries. We will require a copy of spouses' tax return if we do not prepare your spouses' tax return.

How many dependent children are insured under the policy?

Number of dependent children =

Out of pocket medical expenses **over \$2,060** (exclude cosmetic procedures & non script medicines)

Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
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If yes, please provide

Details may be obtained from Medicare and your Fund

Medicare Number	Total Medical Expenses	Medicare Refunds	Health Fund Refunds
	\$	\$	\$

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SPOUSE DETAILS

Please provide the following spouse/partner details if your spouse's tax return is **NOT** prepared by Fang Miao

Registered Tax Agent.

Name (include surname) :	Date of birth :
Tax file number :	Taxable income \$
Reportable fringe benefits \$	Net rental property income (c r loss) \$
Net foreign income \$	Private hospital insurance policy details :
<i>In some instances we may require a copy of your partner's tax return otherwise we may not be able to provide you with an estimate of your tax position.</i>	