



JG Accountants Pty Ltd

Bookkeeping --- Taxation --- Business Services

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Name:	First:	Surname:
TFN: (tax file number)		
Date of Birth:		
Occupation:		
Sex:	Male: <input type="checkbox"/>	Female: <input type="checkbox"/>
Home Address:		
Postal Address: (if different from postal)		
Mobile/Home Ph:		
Email Address:		
Bank Account Details for Refund Purpose	BSB: Account No: Account Name:	
Tax Resident - full year?	If not, indicate date became tax resident:	

Please provide spouse and dependent children information

Spouse and Dependent Children Information

Spouse Name:	First:	Surname:
Date of Birth:		
Spouse Taxable Income:		
Number of Dependent Children:		

INCOME

PAYG Summaries from Employers
Centrelink Payment
Dividend & Franking Credit
Bank Interest

DEDUCTIONS & MEDICARE

Have you used your personal car for work related purpose? If so how many kilometres have you travelled for the financial year? Any travel to and from home should not be included.		Please provide rego, car engine type and work related KM travelled
Have you used logbook to keep track of business usage of MV expenses, if so, written evidence for all car expenses except fuel should be provided.		Logbook details needed
Have you received any meal allowance, if so reasonable Commissioner amount can be claimed.		Details
Have you incurred any travel expenses such as airfare, taxicab, accommodation for worked related purposes? If so, please provide details and amount paid		Where travel allowance was received, reasonable ATO amount can be claimed without receipts
Uniform, Protective clothing, laundry and dry cleaning expenses		ATO rate for laundry
Self-education expenses		Amount & receipts
Have you paid any short courses, seminars or conferences that are work related, if so how much?		Amount & receipts
Have you used mobile for work, if so, what is your monthly payment and the percentage usage for work		Amount
Have you had a home office and worked from home, if so, how many hours per week on average		Hours spent per week
Have you bought any computer/laptop/equipment/tools or stationery that were work-related? Provide the date bought and amount paid for each		Receipts
Did you pay for any subscriptions/memberships/registrations/association/union fees that were work related? Please provide the paid amount for each		Receipts
Have you used the internet at home for work related purposes, if so how much is the monthly payment and the percentage of business usage		Amount
Do you have the current low value pool, if so please provide details		Low value pool schedule
Have you made any donations, if so please provide details		Receipts
How much did you pay for your tax return last year and how many kilometres you have travelled to your tax agent		Receipt & KM travelled
Have you had the income protection insurance? if so how much is the premium		Copy of insurance
HELP debt as shown on the taxpayer's statement issued from ATO		Amount
Have you incurred the out-of-pocket medical expenses totalling of more than \$2,060 for the financial year, if so please provide details		Receipts
Have you made any child support payment, if so please provide details		Amount
Details of any super contributions made for your spouse		Amount
Please provide private HOSPITAL COVER details such as insurance provider, membership number and number of days covered		Copy of HOSPITAL cover

I agree that JG Accountants can access the Tax Office Tax Agent Portal and gather information necessary to complete my tax return and handle my tax affairs.

Signed: _____

Date: _____