

If you own a rental property, please refer to our **Rental Property Schedule**

PERSONAL DETAILS		
Name:	Date of Birth:	
Phone No:	Occupation:	
Email Address:		
Home Address:		
Postal Address:		
If Sky Accountants is not preparing your spouse's tax return, please provide us with their taxable income as their income may be required to be recorded in your tax return.	Full Name of Spouse:	
	Date of Marriage (if married during the year):	
	Spouse's Date of Birth:	
	Spouse Taxable Income:	
	Spouse's reportable superannuation contributions:	
Number of dependent children:	Spouse's reportable fringe benefits:	
<b>Your Bank Account Details</b> (to receive any tax refund electronically)		
<b>BSB (Must be 6 digits)</b>	<b>Account Number</b>	<b>Account Name</b>
Would you prefer to pay directly for your return preparation fee, or have it withheld from any potential refund you might be entitled to?		<input type="checkbox"/> Pay Direct <input type="checkbox"/> Please Withhold

## INCOME DETAILS

1. **Income Summaries** (Formerly known as Group Certificates / Payment Summaries)  Yes  No
- How many employers did you work for during this financial year? \_\_\_\_\_
  - Did you receive a lump sum payment when leaving an employer this financial year?  Yes  No

2. **Other Salary Income** (includes any directors' fees, commissions, tips etc.) Please provide details  Yes  No

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3. **Government Payments** (includes government allowances and pensions)

Type of Payment	Total Amount Received



## INCOME DETAILS

**4. Superannuation** (money received from your superannuation fund including pensions or lump-sums)

Type of Payment	Total Amount Received

**5. Interest** (money received on your bank accounts)

Name of Bank	Account No.	Total Interest Received	TFN Withholding	Joint Account?
				<input type="checkbox"/> Yes <input type="checkbox"/> No
				<input type="checkbox"/> Yes <input type="checkbox"/> No

**6. Dividends**

Please provide copies of dividend statements

Name of Company	No. Shares Held	Amount Received	Joint Account?
			<input type="checkbox"/> Yes <input type="checkbox"/> No
			<input type="checkbox"/> Yes <input type="checkbox"/> No
			<input type="checkbox"/> Yes <input type="checkbox"/> No

**7. Employee Share Schemes:** Please provide documentation from your employer regarding any employee share scheme transactions you have been involved in during the year

**8. Trust Distributions and Partnership Income:** Please provide documents including Annual Tax Statements or a copy of the trust/partnership tax return.

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**9. Capital Gain** – Did you sell any assets such as shares, crypto currency or property which were acquired after 20 September 1985? If yes, then please attach documentation for the original purchase and sale.

Applicable?  Yes  No

**9. Foreign Income**

Did you receive foreign income/salary? – please attach all relevant documentation.  Yes  No  
 Did you receive any Foreign Dividends? If yes, please provide statements.  Yes  No

**10. Rental Income** – Please attach details of the rent received and all expenses in their separate categories. A Rental Property Schedule is available from our office for your convenience.



## INCOME DETAILS

11. **Any Other Income** (Any other income you received in the financial year which doesn't fit into any of the above categories.)

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12. **Business Income** (If you operate a business as a sole trader, please supply details of your businesses income and expenses.)

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## DEDUCTION DETAILS

*With the ATO increasingly scrutinizing personal tax deductions, it is important that care is taken to ensure that all tax deductions claimed are valid and that they can be fully substantiated. Please click on the [link](#) to view the ATOs guidance to assist in understanding what deductions can be claimed and the record keeping requirements.*

1. **Motor Vehicle** – Did you use your own car for business/work purposes during the year?  Yes  No

If yes, then please provide information for either (a) or (b) below.

(a) **Log Book Method:** Please provide details of all expenses you incurred over the financial year under the following categories:

Expense Type	Amount
Fuel	
Insurance	
Registration	
Services/Repairs	
Loan Interest or lease payments (if applicable) – if you have hire purchase or lease please provide the paperwork	
Other – please specify:	
Log book %	
Cost of vehicle and date of purchase <span style="float: right;">Date:</span>	

When was your log book completed? \_\_\_\_ / \_\_\_\_ / \_\_\_\_.

(b) **No Log Book:** Let us know how many business kilometres you travelled during the year (up to 5000 kms)

Kilometres: \_\_\_\_\_ kms

2. **Travel Expenses** (Costs incurred for work related travel, including tolls, parking, public transport, vehicle hire and, if your travel was overnight, meals or accommodation)

Description	Amount



## DEDUCTION DETAILS

**3. Work Uniform**

Do you wear a uniform or protective clothing?  Yes  No

If yes, please provide the costs associated with purchasing and maintaining the uniform, e.g. laundry (up to \$150 without receipts), cost of protective clothing such as work boots, sunscreen, hats, eye protection.

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**4. Self-education Expenses** (includes seminar costs, text books, stationery, student union fees, course fees (except HECS/HELP), depreciable items used for self-education purposes e.g. Computer, Reference library)

Description	Amount

**4. Other Work Related Deductions** – please provide details.

Description	Amount
Diary, stationery, work materials	
Union Fees / Professional Bodies	
Mobile phone	
Tools and equipment	
Income protection	
Subscriptions	
Other – please specify:	

**5. Home Office Expenses** – Do you work from home at any time?  Yes  No

If yes, please complete the table below. We will include a portion of these expenses on your tax return based on your percentage work related use.

Number of hours spent on work related activities at home: \_\_\_\_\_

The ATO have changed the method for claiming home office deductions effective from 1 July 2022. Items like telephone, internet, etc can no longer be claimed separately when using the 'fixed rate' method. However, these items may be claimed when using the 'actual' method. Click the [link](#) for further information on home office deductions.

Internet: per month \$ \_\_\_\_\_ how much is work related? \_\_\_\_\_% work related use  
 Home phone: per month \$ \_\_\_\_\_ how much is work related? \_\_\_\_\_% work related use  
 Mobile phone: per month \$ \_\_\_\_\_ how much is work related? \_\_\_\_\_% work related use

Computer & office equipment purchased: \_\_\_\_\_

Furniture in home office: \_\_\_\_\_

Any other expenses that may be eligible? e.g. Files, cabinets, desk lamp, printing materials etc.

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## DEDUCTION DETAILS

**6. Interest & Dividend Deductions**

Description	Amount
Interest on loans to acquire shares	
Cost of investment advisor	
Reference Materials	
Other – please specify:	

**7. Donations to Deductible Gift Recipients**

Yes  No

Name of Body	Amount

**8. Tax Agent Fees** (from previous year): \_\_\_\_\_

**9. Superannuation Contributions** – Did you make a voluntary super contribution during the financial year?  Yes  No

Were you looking to claim a deduction for this contribution?  Yes  No

*(If yes, please provide a copy of the letter from your superannuation fund confirming your eligibility for this deduction – we will require a copy of this on record before lodgement can be completed)*

Have you made superannuation contributions on behalf of your spouse during the financial year?  Yes  No

**10. Other** (Any costs that were directly related to your employment please provide details)

Description	Amount

## TAX OFFSETS & REBATES

**1. Do you have private health insurance?**  Yes  No

Did you make any changes to your coverage during the financial year? If yes, please provide details  Yes  No

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