

Tax Return Information Form

Please e-mail or post this form back to our office **PRIOR** to your appointment:

CLIENT NAME: _____

TO: 360 Financial Advantage Pty Ltd ACCOUNTANT: _____

INFORMATION FOR 2018 TAX RETURN (1 July 2017 to 30 June 2018)

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

BANK DETAILS - THE ATO NO LONGER ISSUES REFUND CHEQUES. PLEASE PROVIDE YOUR BANK ACCOUNT DETAILS FOR YOUR REFUND

Account Name:				Bank Name:			
BSB:				Account No.:			

CHILDREN

No. of dependants:							
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PAYG PAYMENT SUMMARIES (Please Email or Post All Payment Summaries)

Employer:	Occupation:						

BANK INTEREST

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

WORK AND OTHER EXPENSES (Please email or post details)

Motor Vehicle Type:		Reference Books:	\$
Work Kilometres:		Stationery:	\$
Taxi Fares:	\$	Mobile Phone:	REFER ATTACHED QUESTIONNAIRE
Other Travel:	\$	Internet:	REFER ATTACHED QUESTIONNAIRE
Uniform/Laundry:	\$	Memberships:	\$
Sun Protection Items:	\$	Tools and Equipment:	\$
Self-Education:	\$	Interest Expenses:	\$
Union Fees:	\$	Gifts and Donations:	\$
Seminars/ Prof Development:	\$	Income Protection Insurance:	\$
		Other Expenses:	Please Attach Details

PRIVATE HEALTH INSURANCE

Do you have a private health insurance?	<input type="checkbox"/> Yes- Please provide Private Health Statement <input type="checkbox"/> No		
DO YOU HAVE ANY OF THESE ITEMS? (If so, then please download additional forms www.360fa.com.au)	<input type="checkbox"/> Investment income <input type="checkbox"/> Investments sold	<input type="checkbox"/> Rental properties <input type="checkbox"/> Motor vehicles used for work	

CLIENT SIGNATURE: _____

DATE: _____

Telephone and internet expenses questionnaire

Taxpayer's name _____

Tax file number _____

Year ended _____

Employer _____

1. Nature of your business/occupation:

2. Why did your employment duties demand that you use your personal home or mobile phone and internet cost (i.e., where the relevant costs have been paid for by you and not reimbursed by your employer)?

3. Will your employer support the need for you to use your phone or private internet? **YES/NO**

If **no**, then why do you believe a claim can still be made?

4. How have you determined the business and private use of the phone and internet usage over the year (e.g., have you maintained a diary or have itemised bills supporting your claims and apportionment)?

5. Has the claim for rental/leasing taken into account both incoming and outgoing calls? **YES/NO**

If **yes**, then provide details:

Taxpayer's telephone and internet expenses declaration

A. I confirm that I wish to make the above claim on the basis that I have incurred the above telephone and/or internet expenses) in deriving my assessable income and I have the necessary records to substantiate my claim;

B. My tax agent has explained to me the law as it relates to claims to telephone and/or internet expenses; and

C. I understand that if I have any further queries it is my responsibility to raise them with my tax agent or request a Private Binding Ruling for the ATO.

Signed

Dated

Incidental phone expenses safe harbour worksheet

Taxpayer's name _____

Tax file number _____

Year ended _____

Employer (if applicable) _____

Applicable phone #'s _____

The following work sheet should be utilised when calculating an individual's incidental use of either their mobile phone or landline where they are claiming more than the safe harbour deduction of \$50 in total for a particular income year.

The relevant rates (reproduced below) are established in the ATO's fact sheet *claiming mobile phone, internet and home phone expenses*.

Type of work related communication	Number of communications (A)	Safe harbour Rates (B)	TOTAL (A) X (B)
Landline call		\$0.25	
Mobile call		\$0.75	
Text message		\$0.10	
TOTAL incidental phone expenses			\$

Taxpayer's telephone expenses declaration

I confirm that my tax agent has explained to me the law as it relates to claims for telephone/mobile expenses and safe harbour provisions. However, I wish to claim ____% of my monthly telephone/mobile expense \$____/mth.

Signed.....

Dated.....