

2021 Personal Tax Return Questionnaire Checklist

Preamble:

To assist us in preparing your income tax return, please complete this Questionnaire when compiling your information.

Completing the Questionnaire can take considerable time and effort but in doing so, you will avoid unnecessary delays in processing and lodging your returns and extra costs because we need to come back to you with requests for additional information.

With respect to your income, please be aware that the Australian Taxation Office (ATO) can check the income reported in your return against independent sources. This applies to PAYG Payment Summary Income, Interest received, Dividends, Cryptocurrency transactions, online trading, Overseas income etc.

For Deductions, self-assessment rules apply¹. In the event of a Tax Office Audit, you will need to substantiate the deductions claimed. Please note, our assistance in the audit process would involve additional fees.

If you have sold any assets during the year, please complete our Capital Gain/Loss Form so we can determine whether Capital Gains Tax applies to the transaction(s). A PDF version is available for download from our website at [accsysbp.com.au / downloads](http://accsysbp.com.au/downloads).

Please sign and date the Questionnaire below then send it along with your supporting documentation to us by one of the following methods:

1. Email to info@accsysbp.com.au, or
2. Deliver to Ground Floor, Centrepoint Tower, 123B Colin Street, West Perth, or
3. Post to Accsys Business Partners Pty Ltd , PO Box 1137, West Perth 6872
4. Should you require an appointment please ring Scott, Niraj or Inez on 9486 4722 to arrange a time.

I hereby instruct you to prepare my Taxation Return for the financial year ended 30 June 2021.

I undertake to supply all information necessary to carry out such services, and will be responsible of the accuracy and completeness of such information.

Name: _____ Signature: _____

Date: _____

¹The self-assessment system places the onus on you to ensure your tax return complies with taxation Laws. You must show all your assessable income and claim only the deductions and offsets, (formerly called rebates), to which you are entitled.

PERSONAL DETAILS New Clients please complete all fields. Current Clients please update where details have changed.			
Full Name	Title:		
Home Address			
Postal Address (if different to home address)			
Telephone	Home:	Mobile:	
	Fax:	Business:	
Email Address			
Occupation			
Date of Birth			
Spouse's Name			
Spouse's Date of Birth			
Period you had a spouse during the year	<input checked="" type="checkbox"/> If whole year	or	to
Spouse's Taxable Income (If we don't prepare their Tax Return)	\$		
Please list names and dates of birth of children	Name	Date of Birth	<input checked="" type="checkbox"/> if a Dependant
Bank Account Details – <i>It is now a requirement to provide Electronic Funds Transfer (EFT) details in your tax return if you are receiving a refund.</i>			
Bank and Branch			
Name Account is in			
Account Number			
BSB			
Please tick Yes if you would like Accsys Business Partners Pty Ltd to deduct their fee from your refund? We will send a separate authority for you sign for this service.			Yes

1. If we are preparing your tax return for the first time please provide:	✓ if Yes	✓ if supporting documentation provided and / or note any comments
1.1 A copy of your last tax return		
1.2 Copies of any other correspondence from the ATO E.g. Objections, Penalties, Payment arrangements		
2. Income	✓ if Yes	✓ if supporting documentation provided and / or note any comments
2.1 PAYG Payment Summaries from Employment		
2.2 Allowances, director's fees, benefits and other earnings not on your PAYG Payment Summary		
2.3 Lump sum payments e.g. Pro Rata Annual Leave		
2.4 Employment Termination Payment Summary		
2.5 Australian Government pensions, allowances and payments e.g. Age Pension, Carer Payment, Parenting – Single, Youth Allowance, Austudy, Newstart, Job Seeker		
2.6 An Australian annuity, superannuation income stream or superannuation lump sum payment		
2.7 Interest income from any source within Australia		
2.8 Dividends from companies in Australia, including any dividends reinvested		
2.9 Shares or options from your employer		
2.10 Have you sold or disposed of any assets? Please download and complete our Capital Gain/Loss PDF Form available at accsysbp.com.au / downloads		
2.11 Distributions from a partnership or trust including managed funds		
2.12 Business income / Personal Services income		
2.13 Foreign pension or annuity		
2.14 Foreign interest, royalties, dividends, rent or any other income from foreign sources		
2.15 Money from the sale of foreign assets such as real property or shares		

2.16	Do you have foreign assets valued over \$50,000?		
3.	Deductions	✓ if Yes	✓ if supporting documentation provided and / or note any comments
3.1	Motor vehicle expenses: Please download and complete our Motor Vehicle PDF Form available at accsysbp.com.au / downloads		Copy of Log Book
3.2	Travel expenses related to your employment		
3.3	Work related uniform, protective or occupation specific clothing, laundry and dry cleaning		
3.4	Work related self education expenses		
3.5	Union fees		
3.6	Mobile phone and other mobile devices used for work e.g. laptop, iPad		
3.7	Home Office running expenses – please provide hours per day and number of days in the period 01/07/2020 – 30/06/2021. Note, there are 3 methods available to claim these expenses including Actual costs, Fixed rate 52 cents per hour and COVID Shortcut rate of 80 cents per hour. For explanation and ATO calculator visit: https://www.ato.gov.au/calculators-and-tools/home-office-expenses-calculator/		
3.8	Donations / gifts		
3.9	Interest expenses relating to borrowings for investments		
3.10	Tax Agent fee(s) for prior year tax return preparation and lodgement		
3.11	Personal Superannuation contributions where you wish to claim a deduction		
3.12	Income Protection / Sickness & Accident Insurance		
3.13	Other work related expenses		
4.	Tax Offsets	✓ if Yes	✓ if supporting documentation provided and / or note any comments
4.1	Private health fund membership – please provide EOFY fund statement if provided by your Health Fund		
4.2	Did you maintain an Invalid or Invalid Carer?		
4.3	Have you contributed superannuation on behalf of your spouse?		

4.3	<p>Zone & Overseas Forces Tax Offsets: If you live in a remote area or serve in forces overseas, you may be eligible</p> <p>Note: Your usual place of residence must be within a remote area in order to be eligible for the offset.</p>	Location:
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5.	Other Information	✓ if Yes	✓ if supporting documentation provided and / or note any comments
5.1	Do you have a HECS / HELP debt? Have you made voluntary contributions?		
5.2	Did you pay or receive child support? Please provide details.		
5.3	Were you under the age of 18 years on 30/06/2021?		
5.4	Do you have a MyGov account linked to the ATO?		
6.	Financial Health Check Questions	✓ if Yes	✓ if supporting documentation provided and / or note any comments
6.1	Have you reviewed your residential and investment loans during the last 12 months?		
6.2	If you have income protection insurance, has it been reviewed in the last 12 months?		
6.3	Have you consulted a financial planner in the last 12 months?		
6.4	Do you have a will?		