Individual Tax Return Questionnaire

Year Ended 30th June 201_ (Enter Year)



Please email, fax or post this form back to our office **PRIOR** to your appointment:

| TO: Simon Jones & Co | FAX: | (03) 9742 5644 |
|----------------------|---------|-----------------------|
| ATTENTION: | E-MAIL: | accountant@sjc.com.au |

| INFORMATION FOR TAX RETURN | | | | | | | | | |
|--|---|--|--|---|--|-------------------|------------------------------|--|--|
| Name: | S | | Spouse Name: | | | | | | |
| DOB: | s | | Spouse DOB: | pouse DOB: | | | | | |
| Address: | | Postal Address: | | | | | | | |
| TFN: | | Email: | | | | | | | |
| Phone: | w | Н | | | м | | | | |
| CHILDREN | | | | | | | | | |
| Name: N | | Name: | ame: | | | | | | |
| DOB: | | | DOB: | | | | | | |
| School: | I: Primary/Secondary | | School: Prim | | Primary/ | Primary/Secondary | | | |
| Education Costs: | | | Education Costs | Education Costs: | | | | | |
| Name: | | | Name: | ame: | | | | | |
| DOB: | | | DOB: | OB: | | | | | |
| School: | Primary/Secondary | | School: | | Primary/Secondary | | | | |
| Education Costs: | | | Education Costs | :: | | | | | |
| PAYG PAYMENT SUMMA | ARIES (Please Attach or Fa | ax All Slips) | | | | | | | |
| Emple | oyer: | Occupa | tion: | | Gross: | | Tax: | | |
| | | | | \$ | | | \$ | | |
| | | | | \$ | | | \$ | | |
| | | | | \$ | | | \$ | | |
| | | | | | | | | | |
| BANK INTEREST | | | | | | | | | |
| BANK INTEREST Bar | nk: | Αmoι | nt: | | TFN Cre | edits: | Bank Charges: | | |
| | nk: | Amou \$ | nt: | | TFN Cre | edits: | Bank Charges: | | |
| | nk: | | nt: | | TFN Cre | edits: | Bank Charges: | | |
| | | \$ | nt: | | TFN Cre | edits: | Bank Charges: | | |
| Bar | | \$ | nt: Self Educati | on: | TFN Cre | edits: | Bank Charges: | | |
| Bar WORK EXPENSES (Please Work related tools: | e Attach Detailed Listing) | \$ \$ | Self Educati | - | \$ | | Bank Charges: | | |
| Bar WORK EXPENSES (Please Work related tools: | e Attach Detailed Listing) \$ ulators, electronic organisers | \$ \$ | Self Educati | e fees, | \$ student u | | | | |
| Bar WORK EXPENSES (Please Work related tools: (Eg tools of trade, calcu | e Attach Detailed Listing) \$ ulators, electronic organisers | \$ \$ s, tablets, software) | Self Educati (Eg. – course | e fees, | \$ student u | | | | |
| Bar WORK EXPENSES (Please Work related tools: (Eg tools of trade, calco Details of Allowances Rec'd | e Attach Detailed Listing) \$ ulators, electronic organisers | \$ \$ s, tablets, software) | Self Educati (Eg. – course Seminars/P | e fees, | \$ student u v: \$ | | | | |
| Bar WORK EXPENSES (Please Work related tools: (Eg tools of trade, calco Details of Allowances Rec'd Work Kilometres* | e Attach Detailed Listing) \$ ulators, electronic organisers | \$ \$ s, tablets, software) | Self Educati (Eg. – course Seminars/P Stationery: | e fees, rof De | \$ student u v: \$ \$ | | | | |
| Bar WORK EXPENSES (Please Work related tools: (Eg tools of trade, calco Details of Allowances Rec'd Work Kilometres* Taxi Fares: | e Attach Detailed Listing) \$ ulators, electronic organisers Refer separate fo \$ | \$ \$ s, tablets, software) | Self Educati (Eg. – course Seminars/P Stationery: Uniform: | e fees, rof De | \$ student ui v: \$ \$ \$ \$ \$ | | | | |
| Bar WORK EXPENSES (Please Work related tools: (Eg tools of trade, calco Details of Allowances Rec'd Work Kilometres* Taxi Fares: Other Travel: | e Attach Detailed Listing) \$ ulators, electronic organisers I Refer separate fo \$ \$ \$ | \$ \$ s, tablets, software) | Self Educati (Eg. – course Seminars/P Stationery: Uniform: Union Fees: | e fees, rof De | \$ student ui v: \$ \$ \$ \$ \$ \$ ms: \$ | | | | |
| Bar WORK EXPENSES (Please Work related tools: (Eg tools of trade, calco Details of Allowances Rec'd Work Kilometres* Taxi Fares: Other Travel: Books or Trade Journals: | e Attach Detailed Listing) \$ ulators, electronic organisers Refer separate for \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ | \$ \$ s, tablets, software) orm (see below) | Self Educati (Eg. – course Seminars/P Stationery: Uniform: Union Fees: Sun Protect | e fees, rof De | \$ student ui v: \$ \$ \$ \$ \$ \$ ms: \$ | | | | |
| Bar WORK EXPENSES (Please Work related tools: (Eg tools of trade, calco Details of Allowances Rec'd Work Kilometres* Taxi Fares: Other Travel: Books or Trade Journals: Income Protection Insurance | e Attach Detailed Listing) \$ ulators, electronic organisers Refer separate for \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ | \$ \$ s, tablets, software) orm (see below) | Self Educati (Eg. – course Seminars/P Stationery: Uniform: Union Fees: Sun Protect | e fees, rof De ion Ite ase de | \$ student ui v: \$ \$ \$ \$ \$ \$ ms: \$ | | | | |
| Bar WORK EXPENSES (Please Work related tools: (Eg tools of trade, calco Details of Allowances Rec'd Work Kilometres* Taxi Fares: Other Travel: Books or Trade Journals: Income Protection Insurance OTHER EXPENSES (Please Donations | e Attach Detailed Listing) \$ ulators, electronic organisers Refer separate for \$ \$ \$ \$ ce : \$ e Attach Detailed Listing) | \$ \$ s, tablets, software) orm (see below) s are restricted to no | Self Educati (Eg. – course Seminars/P Stationery: Uniform: Union Fees: Sun Protect Other : (Plea Tax Agent F et eligible expens | ion Ite ase de | \$ student ui v: \$ \$ \$ \$ \$ \$ ms: \$ tail) | nion fees, tuto | rial fees, text books, etc.) | | |
| Bar WORK EXPENSES (Please Work related tools: (Eg tools of trade, calco Details of Allowances Rec'd Work Kilometres* Taxi Fares: Other Travel: Books or Trade Journals: Income Protection Insurance OTHER EXPENSES (Please Donations | e Attach Detailed Listing) \$ ulators, electronic organisers Refer separate for \$ \$ \$ \$ e Attach Detailed Listing) \$ cket medical expense claims | \$ \$ s, tablets, software) orm (see below) s are restricted to no | Self Educati (Eg. – course Seminars/P Stationery: Uniform: Union Fees: Sun Protect Other : (Plee | e fees, rof De ion Ite ase de ees : es for | student ui v: \$ \$ \$ ms: \$ tail) disability a | nion fees, tuto | rial fees, text books, etc.) | | |
| Bar WORK EXPENSES (Please Work related tools: (Eg tools of trade, calco Details of Allowances Rec'd Work Kilometres* Taxi Fares: Other Travel: Books or Trade Journals: Income Protection Insuranc OTHER EXPENSES (Please Donations Please note : Out of po | e Attach Detailed Listing) \$ ulators, electronic organisers Refer separate for \$ \$ \$ \$ e Attach Detailed Listing) \$ cket medical expense claims | \$ \$ s, tablets, software) orm (see below) s are restricted to no | Self Educati (Eg. – course Seminars/P Stationery: Uniform: Union Fees: Sun Protect Other : (Plea Tax Agent F et eligible expens ntil 30/6/19 | e fees, rof De ion Ite ase de ees : es for lome (| student un v: \$ \$ \$ \$ ms: \$ tail) disability a | nion fees, tutor | rial fees, text books, etc.) | | |
| Bar WORK EXPENSES (Please Work related tools: (Eg tools of trade, calco Details of Allowances Rec'd Work Kilometres* Taxi Fares: Other Travel: Books or Trade Journals: Income Protection Insurance OTHER EXPENSES (Please Donations Please note : Out of po | e Attach Detailed Listing) \$ ulators, electronic organisers Refer separate for \$ \$ \$ \$ e Attach Detailed Listing) \$ cket medical expense claims SE ITEMS? Rental Properties | \$ \$ s, tablets, software) orm (see below) s are restricted to no | Self Educati (Eg. – course Seminars/P Stationery: Uniform: Union Fees: Sun Protect Other : (Ples Tax Agent F t eligible expens ntil 30/6/19 | e fees, rof De ion Ite ase de ees : es for lome (| student un v: \$ \$ \$ \$ ms: \$ tail) disability a | nion fees, tutor | rial fees, text books, etc.) | | |