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.)		