



Expats Main Residence Exemption – From 1st July, 2020, if you sell your Australian Main Residence while you are an overseas resident for tax purposes you will not be entitled to cover the capital gain with your main residence exemption. This applies retrospectively right back to the time it was purchased so there will not even be an exemption for the time you were living in Australia. Further, the 50% capital gains tax discount will not apply to the period of time you are a non resident for tax purposes. There is a small carve out from some very serious life events in the first 6 years you are a non resident but the take away here is, **do not sell your Australian home while you are living overseas**. This is based on the date the contract to sell is signed.

PERSONAL DETAILS

Your Name: Mr | Mrs | Ms | Miss _____ DOB: ____ / ____ / ____

Was this the name used on your last tax return? YES NO

Details if no: _____

Your Spouse's Name: Mr | Mrs | Ms | Miss _____ DOB: ____ / ____ / ____

Was this your spouse's name used on your last tax return? YES NO

Details if no: _____

Spouses adjustable Australian taxable income if we are not doing their tax return: \$ _____

Existing clients need only provide details of changes that have occurred since you lodged your last income tax return

Your Tax File Number: _____ Spouse's Tax File Number: _____

Residential Address: _____

Postal Address: _____

Has your postal address changed since lodging a tax return? YES NO

Telephone: (W) _____ (H) _____ (M) _____

Are you a war veteran or widow/widower of a war veteran yet under the Aged Pension age? YES NO

Is your spouse a war veteran or widow/widower of a war veteran yet under the Aged Pension age? YES NO

If married / de facto in 2022/2023, what date did this occur: ____ / ____ / ____

Did an accountant prepare your last Income Tax Return? YES NO

Please attach a copy of your previous return if this is the first time using our services

If yes please provide contact details of previous accountant: _____

Your Bank Account Details for Direct Deposit of Refunds BSB: _____ ACCT NO:: _____

The ATO is no-longer issuing cheques Acct Name: _____

Do you have a will? YES NO

