

**PERSONAL DETAILS**

Your Name: Mr | Mrs | Ms | Miss \_\_\_\_\_ DOB: \_\_\_\_ / \_\_\_\_ / \_\_\_\_

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

Details if no: \_\_\_\_\_

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

Tax File Number: \_\_\_\_\_ Occupation: \_\_\_\_\_

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

Do you operate under an ABN? YES  NO

If yes please complete a Business Schedule which is available under the heading *Additional Forms* on the BAN TACS mail-ins page: [www.bantacs.com.au/mail-in\\_tax\\_returns.php](http://www.bantacs.com.au/mail-in_tax_returns.php)

**Family Details** **Note**, this includes same sex couples

Spouse's Name: Mr | Mrs | Ms | Miss \_\_\_\_\_ DOB: \_\_\_\_ / \_\_\_\_ / \_\_\_\_

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

Details if no: \_\_\_\_\_

Spouse's TFN: \_\_\_\_\_ Spouse's Occupation: \_\_\_\_\_

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

If married / de facto in 2015/2016, what date did this occur: \_\_\_\_ / \_\_\_\_ / \_\_\_\_

~ If you share care for your own children, please advise the % of care allocated to you by the Family Assistance Office: \_\_\_\_\_ %

**TAX AGENT DETAILS**

Attach a copy of your previous return if this is the first time using this mail-in service

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

If yes please provide contact details of previous accountant: \_\_\_\_\_

Bank Account Details for Direct Deposit of Refunds BSB: \_\_\_\_\_ ACCT NO:: \_\_\_\_\_

Note the ATO no longer post out cheques Acct Name: \_\_\_\_\_

Do you have a will? YES  NO

Do you have an Enduring Power of Attorney? YES  NO

Do you feel comfortable that your financial affairs are under control? YES  NO

If not would you like to discuss any of the areas listed below with us, or one of our affiliated service providers?

- Income Protection Insurance     Life Insurance     Superannuation     Financial Planning Strategies

# INCOME

Did you receive income from Salary or Wages **YES**  **NO**

Did you receive any allowances, directors' fees, bonuses, cents per kilometre, reimbursements and tips etc. **YES**  **NO**

Please attach copies of payment summaries from all employers

If amounts are not included on your payment summaries please provide details below.

DESCRIPTION OF ALLOWANCE:

AMOUNT:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Did you receive an Employment termination payments **YES**  **NO**

Did you receive an Aust Gov't allowances or payments e.g. Newstart, Youth Allowance, or Sickness Benefit? **YES**  **NO**

Did you receive an Aust. Government pension or other similar benefits **YES**  **NO**

Please attach ETP Summary

Please attach Copies of Payment Summary from relevant Department eg. Centrelink

Please attach Copies of Payment Summary from relevant Department eg. Centrelink

Please attach payment summary received from super fund or life insurance company or friendly society.

NB: see payment summary- superannuation lump sum received from super fund.

Please provide details of Bank Accounts and Interest received

Did you receive income from Australian Annuities or Superannuation income streams? **YES**  **NO**

Did you receive any Australian super lump sum payments? **YES**  **NO**

Did you receive Interest from bank accounts or investments? **YES**  **NO**

ACCOUNT DETAILS:

INTEREST AMOUNT:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Did you receive any Dividend income? **YES**  **NO**

Did you receive income from partnerships and/or trusts? **YES**  **NO**

Did you receive any business income? **YES**  **NO**

Is your business Subcontracting? Did you earn the majority of your income from one contract? **YES**  **NO**

Have you made deposits to or withdrawals from a farm managed deposit? **YES**  **NO**

Did you have any Capital Gains or losses during the financial year? **YES**  **NO**

Did you receive any income from overseas sources? **YES**  **NO**

Please attach all dividend and investment Tax Statements

If yes we will need to discuss with you what additional information may be required

If yes please complete a Business Schedule available under Additional Forms where you obtained this form on the mail-ins page

If yes you will need to complete an additional Business Schedule: [bantacs.com.au/tools.php](http://bantacs.com.au/tools.php)

Please attach bank statements for your Farm Management Account

If yes please complete a CGT Schedule, available under Additional Forms where you obtained this form on the mail-ins page

Please provide details below

DESCRIPTION OF INCOME

AMOUNT

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Did you receive any income from ownership of a Rental property? **YES**  **NO**

Did you receive any bonuses from life assurance or friendly society policies? **YES**  **NO**

Did you receive income from forestry managed investments? **YES**  **NO**

Have your received any other income such as discounts or share rights through an employee share scheme, royalties, scholarships, jury duty etc. **YES**  **NO**

If Yes you are using the wrong form. A Rental Property mail-in form is available where you obtained this form on the mail-ins page

Please attach statements showing amounts received

Please attach paperwork

Please attach any supporting documents showing type of income & any tax paid. For employee share scheme, include the document that explains the discount received

Description of Income

Amount

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**DEDUCTIONS – Please see Substantiation notes at the end of this document to help with deductions**

Do you use your vehicle for work purposes? **YES**  **NO**  If yes please provide car details below

Car 1 Make and Model \_\_\_\_\_ Car 2 Make and Model \_\_\_\_\_

Car 1 Number Plate \_\_\_\_\_ Car 2 Number Plate \_\_\_\_\_

If yes to previous question, do you keep a log book for your car? **YES**  **NO**  If yes, please enclose the log book and all the receipts for expenses.  
If no, use the kms method; see next.

To use the kms method, a detailed reasonable estimate of the kms travelled for work is required; eg, a diary for one month which is representative of the whole year or, if spasmodic, a list for each trip. Please provide the total kms for the year here. A car provided by your employer, even if salary sacrificed cannot be claimed here. A simple diary is available at <http://www.bantacs.com.au/shop-2/diary-template/>

Kilometres travelled in car 1 for work \_\_\_\_\_ kms Kms travelled in car 2 for work \_\_\_\_\_ kms

Do you have any other work related expenses for travel? **YES**  **NO**  If yes please provide details below or as an attachment.  
If no please skip the next questions

DESCRIPTION (eg, parking tolls or taxi's)	AMOUNT
_____	_____
_____	_____

Do you have a travel diary/itinerary and accommodation receipts? **YES**  **NO**  If yes please attach receipts  
If no please provide what you can below.

DESCRIPTION	AMOUNT
_____	_____
_____	_____

Do you have work related uniform and other clothing expenses **YES**  **NO**  If yes please provide details below

DESCRIPTION	AMOUNT
Protective Clothing: _____	_____
Occupation Specific Clothing: _____	_____
Non Compulsory Uniform: _____	_____
Conventional Clothing : _____	_____
Dry Cleaning: _____	_____
Laundry (we need the number of loads per week) _____	Full loads _____ mixed loads _____

Education: Did you attend any:

Work related courses at an educational institution? **YES**  **NO**  If yes please provide details below

Or any seminars and courses? **YES**  **NO**

DESCRIPTION	AMOUNT
Student Union Fees (only for educational institution): _____	_____
Course Fees (please make it whether the course is government subsidised) _____	_____
Text Books: _____	_____
Stationery: _____	_____
Parking: _____	_____
Other: _____	_____
Travel (see below)	_____

You can claim the travel from home to your place of education or from work to your place of education but you cannot claim for the trip from the place of education to your home if you went to work first. So if you travel from home to the place of education and back home again or for that matter anywhere other than work then you are entitled to claim both legs of the journey.

Car 1 Make and Model \_\_\_\_\_ Car 2 Make and Model \_\_\_\_\_

Car 1 Number Plate \_\_\_\_\_ Car 2 Number Plate \_\_\_\_\_

To use the kms method, a detailed reasonable estimate of the kms travelled for work is required; eg, a diary for one month which is representative of the whole year or, if spasmodic, a list for each trip. Please provide the total kms for the year here. A car provided by your employer, even if salary sacrificed cannot be claimed here. A simple diary is available at <http://www.bantacs.com.au/shop-2/diary-template/>

Kilometres travelled in car 1 for work education \_\_\_\_\_ kms Kms travelled in car 2 for work education \_\_\_\_\_ kms

Did you incur any expenses in order to work from your home? YES  NO

If yes please complete the following using the information in the Substantiation section to help you.

A simple diary is available at <http://www.bantacs.com.au/shop-2/diary-template/> AMOUNT

Electricity - can be recorded on an hourly basis: \_\_\_\_\_

Internet access - apportioned: \_\_\_\_\_

Stationary: \_\_\_\_\_

Telephone calls for work: \_\_\_\_\_

Printer cartridges: \_\_\_\_\_

Computer depreciation: \_\_\_\_\_

Is there a room set aside that you use apart from the rest of the family? YES  NO

Keep a diary for one month showing how many hours you spend working in that room

Did you purchase and tools and equipment for work? YES  NO

If yes please provide details below

DESCRIPTION (please see substantiation notes) AMOUNT

\_\_\_\_\_

Subscriptions, union fees or professional body fees YES  NO

If yes please provide details below

DESCRIPTION AMOUNT

\_\_\_\_\_

Journals/periodicals YES  NO

If yes please provide details below

DESCRIPTION AMOUNT

\_\_\_\_\_

\_\_\_\_\_ AMOUNT

Sun protection YES  NO

Any other work deductions YES  NO

If yes please provide details below

DESCRIPTION AMOUNT

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_ AMOUNT

Expenses related to dividend and interest income YES  NO

If yes please provide details below

DESCRIPTION (i.e. interest on a loan to purchase shares) AMOUNT

\_\_\_\_\_

\_\_\_\_\_

Gifts and donations YES  NO

If yes please provide details below

NAME OF DONATION RECIPIENT AMOUNT

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_ AMOUNT

Cost of managing tax affairs (e.g. tax agent fees): \_\_\_\_\_

Number of kms travelled to have tax return completed last year: \_\_\_\_\_ KMs

Which car did you use when you saw your accountant? \_\_\_\_\_ Make/Model: \_\_\_\_\_

Do you have any losses carried forward from previous years? YES  NO

AMOUNT

Non-Primary Production carried forward losses: \_\_\_\_\_

Primary Production carried forward losses: \_\_\_\_\_

Have you made any personal superannuation contributions in excess of those made for you by your employer? YES  NO

For example to qualify for the CoContribution If yes please provide details below

How/When were contributions made: \_\_\_\_\_

Name of Fund : \_\_\_\_\_

Amount (if not on PAYG Summary)

Policy Number: \_\_\_\_\_

Did you make any Superannuation contributions on behalf of spouse YES  NO

If yes please provide details below

How/When were contributions made: \_\_\_\_\_

Amount (if not on PAYG Summary)

Name of Fund & Policy Number: \_\_\_\_\_

Do you have a Forestry Management Investment Scheme Deduction YES  NO

Do you have Income Protection Insurance? YES  NO

If yes please provide details below

Name of Fund & Policy Number: \_\_\_\_\_

Amount \_\_\_\_\_

## TAX OFFSETS

Did you maintain a person over 16 who is caring for an invalid YES  NO

Note since 1<sup>st</sup> July, 2014 the tax offsets (rebates) for dependants, including spouses, have been removed. An offset is only available if you maintain someone who is caring for an invalid.

If yes we will contact you for more information so don't hesitate to tick yes if you are unsure

Do you have Private Health Insurance? YES  NO

If yes please provide a copy of the Annual Tax Statement issued by your fund.

Does your private health insurance cover all children including ones living with you that are not yours and your children who do not live with you? YES  NO

During the financial year did you live in a remote zone or have you served overseas with the Defence Force? YES  NO

If yes please provide details below.  
See the map at the bottom of this BANTACS website page to see the area covered by a zone: [bantacs.com.au/travelling\\_workers.php](http://bantacs.com.au/travelling_workers.php)

LOCATION, INCLUDE POSTCODE IF IN AUSTRALIA

NUMBER OF DAYS IF LESS THAN 183

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

If total days above are less than 183, did you claim a zone rebate last year? YES  NO

If No please list zones for last year as well

Note: If you lived in a zone for more than 183 days, please list the names and dates of birth of your children

## OTHER

Are you aware of an entitlement to the Medicare exemption/reduction? For example because you were covered by the Defence Force or you received notification from Centrelink that your benefit included an exemption from Medicare. For example temporary residents on a 457 visa. YES  NO

Did you become a tax resident of Australia during the financial year? YES  NO

Date: / /

Did you stop being a tax resident of Australia during the financial year? YES  NO

Date: / /

Has the ATO notified you that you have been selected for an audit or other type of review? YES  NO

If yes please provide a copy of ATO correspondence

Do you owe any money to any government department (e.g. Child Support, HELP, Family Tax Benefit debts)? YES  NO

To Whom: \_\_\_\_\_

Did you receive any capital returns on any listed company shares? YES  NO

If yes please provide details

If you paid child support this financial year, please list the amount here : \$

If yes please provide details

Did you sell a property completely covered by the main residence exemption during the year? YES  NO

If your property was not completely covered by the main residence exemption, please fill out our Capital Gain Schedule:  
[www.bantacs.com.au/docs/m4.pdf](http://www.bantacs.com.au/docs/m4.pdf)

## MEDICAL EXPENSES TAX OFFSET -

From this year through to the 2018/2019 financial year, the only medical expenses that will qualify for the tax offset are disability aids, attendant care or aged care.

Disability Aids: \_\_\_\_\_

\$ \_\_\_\_\_

Attendant and Aged Care: \_\_\_\_\_

\$ \_\_\_\_\_

## SUBSTANTIATION

Usually a receipt is required showing the item purchased, the amount, the date and the name of the supplier is required to claim a tax deduction for a work related expense. Private use may need to be apportioned. For more information refer to our wage earners booklet in the Freebies section of the BAN TACS web site: [www.bantacs.com.au/booklets/Wage\\_Earners\\_Booklet.pdf](http://www.bantacs.com.au/booklets/Wage_Earners_Booklet.pdf). Many of the following expenses require a one month diary or similar record. You can purchase all the spreadsheet templates you need to keep these records for just \$5.95 from the BAN TACS website Shopping section: <http://www.bantacs.com.au/shop-2/diary-template/>.

**Laundry** – You can claim 50 cents per mixed load and \$1 per full load of qualifying uniforms or protective clothing, up to \$150 per year. Simply take your average loads per week and multiply it by the number of weeks you worked.

**Less Than \$300** – If you claim less than \$300 in work related expenses such as self education, tools, uniforms, protective items, stationery, union fees, etc you do not need to substantiate your claim with receipts. Any claim you make for motor vehicle expenses or travel costs (includes tolls and parking) is not counted towards the \$300 limit.

**Less Than \$10** – If each individual expense is less than \$10 and the total of all such expenses does not exceed \$200 you do not need to keep a receipt but must have a diary entry showing the name of the supplier, date, amount and a description of the purchase. This also applies when you can't get a receipt such as parking meters.

**Allowances** – Each year the ATO produces a list of what it considers reasonable travel allowances. If your employer pays you an allowance and you do not claim more than the amount listed by the ATO as reasonable you do not have to substantiate with receipts the amount you incurred. But you do have to have incurred the expense. A diary entry of your food expenses is sufficient. If you are away from home for more than 5 nights you will need to keep a travel diary of what you did each day. You can still claim up to the ATO reasonable amount even if your employer paid you less as long as it was a bona fide allowance (ie not just \$5 per night but sufficient to live off).

The ATO also releases what it considers a reasonable overtime meal allowance each year. Again you can claim up to this amount even if your employer pays you less but you must be paid the allowance under an award.

**Electricity** – The ATO allows you 45 cents per hour for every hour you are working at home in an office separate from the rest of the family. This covers electricity and maintenance on the room. Keep the diary for 1 month.

**Motor Vehicle** – By keeping a diary for one month each year you can claim up to 5,000 kilometres per vehicle you own. If you own a car together with another person and it is only their name on the registration papers they can complete a declaration of joint ownership so you can claim it. You are also considered to be the owner of a car even if it is registered in the name of another family member but you are the one who pays all the expenses relating to it.

**Telephone** – To claim STD and mobile calls from your home phone go through one month's itemised account and work out the numbers that are work related. This percentage of work related calls can be applied to the mobile and STD calls in the other months. Local calls can be apportioned by keeping a diary for one month noting the ratio of private to work related local calls. Line rental can also be apportioned.

**Mobile Phones** – Analyse one month's statement and apply its ratio of work to private calls to the rest of the year.

**Commissioner's Discretion** – If you have sufficient evidence that you have incurred the expense and would be have been entitled to a deduction if you had a receipt then the ATO must still allow you the deduction but it needs to be beyond doubt that you incurred the expense.

**Work related Travel** – Wage earners can claim their motor vehicle expenses when they meet the substantiation requirements and they travel as follows:

1) Bulky Equipment – Home to work travel is claimable if there is no safe storage at work and as a result you transport bulky equipment between home and work. Safe storage is defined as similar to your own personal locker. Therefore a container on a building site to which all and sundry has a key is not safe storage. Case S29 prescribed more than 20kg was bulky. Taxpack gives the example of a ladder and drum kit not because they weigh more than 20kg but because they fulfill the difficulty to carry side of bulky.

2) Abnormal workplace, this is defined in Taxpack as:

*From your normal workplace to an alternative workplace – for example, a client's premises – while still on duty and back to your normal workplace or directly home. From your home to an alternative workplace for work purposes and then to your normal workplace or directly home.*

This includes being sent to another branch or shop to relieve providing you were not employed predominantly to relieve. It covers seminars and visits to customers. It also includes work related tasks performed on the way home or to work but, note MT 2027, the task cannot be insignificant such as dropping off the mail. But if you have to travel out of your way to drop off the mail you can claim for this extra distance. For more refer TD 96/42 & TD 96/43.

3) Between Jobs – note this includes travel from home when home is the base of operations or work begins there. Home can be considered a base of employment if employment related duties have begun before leaving there, providing those employment related duties did not begin merely for the convenience of the taxpayer.

4) Itinerant work – Your job involves travelling to more than one place of work before returning home.

For more information refer our Claiming a Motor Vehicle Booklet which is in the Freebies section of the BAN TACS web site, [www.bantacs.com.au/booklets/Claiming\\_A\\_Motor\\_Vehicle\\_Booklet.pdf](http://www.bantacs.com.au/booklets/Claiming_A_Motor_Vehicle_Booklet.pdf).

**QUEENSLAND**

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[Ningi Office](#)

Ningi Plaza, 1224 Bribie Island Rd, Ningi, QLD 4511

Tel: 07 5497 6777, F:07 5497 6699

[Stanthorpe Office](#)

19 Roger Street, Stanthorpe, QLD 4380

Tel: 07 4681 4288

[Brisbane Office :](#)

Building 1, Gateway Office Park,747 Lytton Road, Murarrie ,QLD 4172

Tel: 1300 911 227

[Toowoomba Office](#)

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[Gold Coast Office](#)

Suite 2b, Level 1,14 Carrara Street, Benowa , QLD 4217

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**NEW SOUTH WALES**

[Tenterfield Office](#)

98 High Street, Tenterfield , NSW 2372

Tel: 02 6736 5383, F: 02 6736 5655

[Sydney Office](#)

Level 20, Tower 2, Darling Park, 201 Sussex Street, Sydney, NSW 2000

Tel: 1300 367 688, F: 02 9744 7882

[Burwood Office](#)

Suite D, 37A Burwood Road, Burwood , NSW 2134

Tel: 1300 367 688, F: 02 9744 7882

[Chatswood Office](#)

Suite 78, 47-53 Neridah Street, Chatswood, NSW 2067

Tel: 02 9410 1366, F: 02 9410 0366

[Central Coast Office](#)

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**SOUTH AUSTRALIA**

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