

## 2020/21 Individual Tax Return Form

Please email or post this form to our office.

Email: info@exceltax.com.au

Address: 25 Cooraminta Crescent, New Gisborne VIC 3438

If you are a new client, please attach a copy of appropriate identification.

Personal Information						
(Please circle one)	T	MR	MRS	MISS	MS	DR
Surname:						
First Name:						
Date of Birth						
Tax File Number		/	/			
Residential Address:			<del></del>			
	Suburb:			State:		Postcode:
Postal Address:						
(If same as above leave blank)	Suburb:			State:		Postcode:
Telephone:						
	Home:			Work:		
	Mobile:					
Email Address:						
Your Occupation:						
Partners First Name:						
Partners Last Name:						

 $RESC-Reportable\ Employer\ Superannuation\ Contributions\ (salary\ sacrificed\ super.\ Not\ including\ the\ 9.5\%\ employer\ amount)$ 

Both found on PAYG Payment Summary.

<sup>\*</sup>RFBA – Reportable Fringe Benefits Amount

Partner's Income (incl	\$	Partners Date of Birth	_/_/	
RFBA & RESC) *				
Dependent Children	Name:	DOB:/_	_/	
Names & Date of Birth	Name:	DOB:/_	_/	
	Name:	DOB:/_	_/	
Income				
PAYG Summary	I can access your PAYG	Summary via the ATO P	ortal, therefore you do	
	not need to attach.			
Interest	\$	TFN Withholdin	\$ g	
Dividends	Please attach dividend	statements.		
Rental Income	Please request Rental P	roperty Form.		
Foreign Income	\$	Details:	Details:	
Other Income	\$	Details:		
Motor Vehicle Work Exper	ises			
Work Related Travel	Number of Work Km 7 2020/21:	Travelled in Type of Car	:	
Note: Only includes travel	to & from work if you c	arry heavy /bulky tools.	If you travel more than	
5000km for work please f	fill in the logbook meth	od info below. A logboo	ok must be kept for 12	
weeks for all personal & w	ork travel, in order to c	laim logbook method.		
Logbook work % (must	%	Date Car Purchased	//	
provide to claim logbook)				
Opening Odometer at 01/07/2020	km	Closing Odometer at 30/06/2021	:km	
Finance on Car?	If yes, please provide documentation.	Number of weeks car used for work	weeks	
Fuel	\$	Insurance	\$	
Registration Cost	\$	Repairs & Maintenance	\$	
Citylink	\$	Parking	\$	
Car Wash	\$	Other Car Expenses	\$	
Other Work Expenses				
Uniform Worn	YES / NO	Uniform Purchases	\$	
Mobile Phone (per month)	\$	Mobile Work %	%	
Stationery	\$	Union Fees	\$	
Internet per month	\$	Internet Work %	%	

 $<sup>{\</sup>rm *RFBA-Reportable\ Fringe\ Benefits\ Amount} \\ {\rm RESC-Reportable\ Employer\ Superannuation\ Contributions\ (salary\ sacrificed\ super.\ Not\ including\ the\ 9.5\%)}$ employer amount)

New Computer Purchase				
(Please circle)	Laptop / Desktop	Computer Work %	%	
New Computer Purchase	\$	Date Computer	/ /	
,		Purchased		
Home Office hours per	hours	Seminars/Professional	\$	
week normally		Development		
Home Office hours per	hours	Number of weeks	weeks	
week during lockdown		worked from home in		
		lockdown		
Self Education	\$	Details:		
Overtime Meal Allowance	\$ per meal	Meals received	meals	
(provide last payslip in				
June 2019)				
Last year Tax Return Fee	\$	Donations	\$	
	_			
Income Protection	\$	Life insurance & some of	ther premiums are not	
Premium		tax deductible.		
Other Expenses	\$	Details:		
Other				
Private Health Insurance	Please attach tax stat	ement.		
	Trease attach tax stat			
Bank Account Details	Account Name:	BSB:	Account Number:	
Bank Account Details for refund		1	Account Number:	
		1	Account Number:	
for refund	Account Name:  YES / NO / NOT SURE	1		
for refund  Are you eligible for	Account Name:  YES / NO / NOT SURE	BSB:		
for refund  Are you eligible for medicare levy exemption?	Account Name:  YES / NO / NOT SURE  If yes, please provide	BSB:  Medicare Exemption certif		
for refund  Are you eligible for medicare levy exemption?  Are you an Australian Tax	Account Name:  YES / NO / NOT SURE  If yes, please provide  YES / NO / NOT SURE  If no, what country ar	BSB:  Medicare Exemption certif	icate.	
for refund Are you eligible for medicare levy exemption? Are you an Australian Tax Resident?	Account Name:  YES / NO / NOT SURE  If yes, please provide  YES / NO / NOT SURE  If no, what country ar	BSB:  Medicare Exemption certifier you from? er tax superannuation continuation continuation continuation.	icate.	
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