



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

\*RFBA – Reportable Fringe Benefits Amount

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

Both found on PAYG Payment Summary.

<b>New Computer Purchase</b> <i>(Please circle)</i>	Laptop / Desktop	<b>Computer Work %</b>	____%
<b>New Computer Purchase</b>	\$ _____	<b>Date Computer Purchased</b>	__ / __ / ____
<b>Home Office hours per week normally</b>	_____ hours	<b>Seminars/Professional Development</b>	\$ _____
<b>Home Office hours per week during lockdown</b>	_____ hours	<b>Number of weeks worked from home in lockdown</b>	_____ weeks
<b>Self Education</b>	\$ _____	<i>Details:</i>	
<b>Overtime Meal Allowance</b> <i>(provide last payslip in June 2019)</i>	\$ _____ per meal	<b>Meals received</b>	_____ meals
<b>Last year Tax Return Fee</b>	\$ _____	<b>Donations</b>	\$ _____
<b>Income Protection Premium</b>	\$ _____	<i>Life insurance &amp; some other premiums are not tax deductible.</i>	
<b>Other Expenses</b>	\$ _____	<i>Details:</i>	
<b>Other</b>			
<b>Private Health Insurance</b>	Please attach tax statement.		
<b>Bank Account Details for refund</b>	Account Name:	BSB:	Account Number:
<b>Are you eligible for medicare levy exemption?</b>	YES / NO / NOT SURE <i>If yes, please provide Medicare Exemption certificate.</i>		
<b>Are you an Australian Tax Resident?</b>	YES / NO / NOT SURE <i>If no, what country are you from? _____</i>		
<b>Superannuation</b>	Did you make any after tax superannuation contributions from 1/7/20 to 30/6/21? YES / NO If so, how much? _____ Did you fill in an "Intention to claim a deduction" form with your super fund? YES / NO		
<b>Any Other Comments</b>			

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Signature Required

Date: ...../...../.....

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