



# 2023/24 Individual Tax Return Form

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

\*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 or Income Statement on MyGov.

<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 2023/24:	Type of Car:	
Note: Only includes travel to & 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 & work travel, in order to claim logbook method.			
<b>Logbook work % (must provide to claim logbook)</b>	_____%	<b>Date Car Purchased</b>	__ / __ / __
<b>Opening Odometer at 01/07/2023</b>	____km	<b>Closing Odometer at 30/06/2024</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> Must have a logo or be occupation specific.	YES / NO	<b>Uniform Purchases</b>	\$
<b>Mobile Phone (per month)</b>	\$	<b>Mobile Work %</b>	____ %
<b>Stationery</b>	\$	<b>Union Fees</b>	\$

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<b>Internet per month</b>	\$	<b>Internet Work %</b>	____%
<b>New Computer Purchase</b> (Please circle)	Laptop / Desktop	<b>Computer Work %</b>	____%
<b>New Computer Purchase</b>	\$	<b>Date Computer Purchased</b>	__ / __ / ____
<b>Home Office hours per week</b>	____ hours	You must keep a record of all hours worked from home due to new ATO rules from 1/3/23.	
<b>Self Education/Seminars</b>	\$	<b>Details:</b>	
<b>Overtime Meal Allowance</b> (provide last payslip in June 2023)	\$ ____ per meal	<b>Meals received</b>	____ meals
<b>Last year Tax Return Fee</b>	\$	<b>Donations</b>	\$
<b>Income Protection Premium</b>	\$	Life insurance & some other premiums are not tax deductible.	
<b>Other Expenses</b>	\$	<b>Details:</b>	
<b>Other</b>			
<b>Private Health Insurance</b>	YES / NO		
<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 If yes, please provide Medicare Exemption certificate.		
<b>Are you an Australian Tax Resident?</b>	YES / NO / NOT SURE If no, what country are you from? _____		
<b>Superannuation</b>	Did you make any after tax superannuation contributions from 1/7/23 to 30/6/24? 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>			

.....  
Signature Required

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

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