



Excel Tax & Accounting

2024/25 Individual Tax Return Form

Please email or post this form to our office.

Email: info@exceltax.com.au

Address: 70 Budburst Drive, Sunbury VIC 3429

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

Personal Information

(Please circle one) MR MRS MISS MS DR

Surname:

First Name:

Date of Birth

Tax File Number

DO NOT PROVIDE VIA EMAIL FOR SECURITY RISKS

Residential Address:

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:

*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.

Partner's Income (incl RFBA & RESC) *	\$	Partners Date of Birth	__ / __ / __
Dependent Children Names & Date of Birth	Name: Name: Name:	DOB: __ / __ / __ DOB: __ / __ / __ DOB: __ / __ / __	
Income			
PAYG Summary	I can access your PAYG Summary via the ATO Portal, therefore you do not need to attach.		
Interest	\$	TFN Withholding	\$
Dividends	Please attach dividend statements.		
Rental Income	Please request Rental Property Form.		
Foreign Income	\$	Details:	
Other Income	\$	Details:	
Motor Vehicle Work Expenses			
Work Related Travel	Number of Work Km Travelled in 2024/25:	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.			
Logbook work % (must provide to claim logbook)	_____%	Date Car Purchased	__ / __ / __
Opening Odometer at 01/07/2024	____km	Closing Odometer at 30/06/2025	____km
Finance on Car?	If yes, please provide documentation.	Number of weeks car used for work	____ weeks
Fuel Costs (if odometer reading not provided)	\$	Insurance	\$
Registration Cost	\$	Repairs & Maintenance	\$
Citylink	\$	Parking	\$
Car Wash	\$	Other Car Expenses	\$
Other Work Expenses			
Uniform Worn Must have a logo or be occupation specific.	YES / NO	Uniform Purchases	\$
Mobile Phone (per month)	\$	Mobile Work %	____ %
Stationery	\$	Union Fees	\$

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Internet per month	\$	Internet Work %	____%
New Computer Purchase (Please circle)	Laptop / Desktop	Computer Work %	____%
New Computer Purchase	\$	Date Computer Purchased	__ / __ / ____
Home Office hours per week	____ hours	You must keep a record of all hours worked for the full financial year.	
Self Education/Seminars	\$	Details:	
Overtime Meal Allowance (provide last payslip in June 2025)	\$ ____ per meal	Meals received	____ meals
Last year Tax Return Fee	\$	Donations	\$
Income Protection Premium	\$	Life insurance & some other premiums are not tax deductible.	
Other Expenses	\$	Details:	
Other			
Private Health Insurance	YES / NO		
Bank Account Details for refund	Account Name:	BSB:	Account Number:
Are you eligible for medicare levy exemption?	YES / NO / NOT SURE If yes, please provide Medicare Exemption certificate.		
Are you an Australian Tax Resident?	YES / NO / NOT SURE If no, what country are you from? _____		
Superannuation	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		
Any Other Comments			

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Signature Required

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

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