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Tax Return Information Request

To help finalise your taxation returns, please provide the following information (only where applicable to you):

ASSESSABLE INCOME

- **PAYG Summaries[#]** *Our office will be able to obtain this directly from the ATO in most circumstances*
 - What was your main job description/activity for the tax year?
 - Do you earn 'special professional income' (e.g., as a professional footballer, musician, actor)?
 - Did you receive a Lump Sum in Arrears payment (usually listed as Lump Sum E on your PAYG Summary)?
 - If so, we require the amounts and previous tax years the lump sum relates to.
- **Centrelink Statements[#]** *Our office will be able to obtain this directly from the ATO in most circumstances*
- **Pension Statements** (including foreign pensions)?
- **ETP Statements[#]**
- **Rental property** details, including for each property:
 - Please provide the Rental income/expense reports (such as the Real estate agents financial year end reports),
 - Other Expenses, such as: Repair & Maintenance, Gardening/Lawn Care, Pest Control, Cleaning, Loan/Mortgage statements confirming total interest & fees paid during the financial year (please also confirm if you have used the loan for other/private purposes), Council/Water Rates, Strata Levies, Insurance costs, Land tax expenses, Depreciation Reports (from a quantity surveyor, if not previously provided), and any other related expenses
 - For land tax purposes, please list the land values for all your properties (as per the council's rateable amounts)
 - For NEW properties being rented, we will also need to confirm:
 - Whose name(s) are on the title & their percentage of ownership each?
 - When did you first buy the property?
 - When did you first rent out the property?
 - Have you ever lived in the property, if so, provide the dates of residence as well as any absence elections (if any)?
- **Interest income[#]** (e.g., term deposits) *Our office will be able to obtain this directly from the ATO in most circumstances*
- **Dividend Statements[#]** and details (if any) *Our office will be able to obtain this directly from the ATO in most circumstances*
- **Employee Share Scheme[#]** Statements & related information
- **Foreign income/asset** details (and does the total value of your foreign assets exceed \$50,000 AUD)?
- **Superannuation** - Do you have any Super statements for Lump sums received or Personal Contributions?
- **Other income** statements, such as, Uber, OLA, Uber Eats, Air BNB, Other sharing economy income, Royalty Income, Minister's allowances, Taxable Scholarships, etc

CAPITAL GAINS TAX event details (such as sales of property or shares or other asset & investments)

- **Contracts of Purchase & Sale** for: Properties/Land, Shares, Bitcoin/Cryptocurrency, Precious metals, patents, options, rights, intangible assets, business sales, etc.
- **Costs incurred when selling/buying the asset** (legal fees, agent commissions, capital costs, etc)
- **Any other assets** particularly those relating to work/business (e.g., new work machines or vehicles etc)

BUSINESS INCOME/EXPENSES (if applicable)

- **Business Cashbook** and bank statements (showing income received and expenses paid throughout the tax year) – [see sample](#)
- **Income/Expense Summaries** or any other additional Income & Expense Reports, such as interests, rental, royalties, annuities, dividends, and capital sales/gains, if any, for the tax year ending.

PRIVATE HEALTH INSURANCE, MEDICARE EXEMPTIONS & OFFSETS

- If you have Private Health Insurance Hospital Cover[#], provide the year end statement confirming days of cover.
 - Please also confirm that you, your spouse, and your dependent children have been covered by the policy?
- If you qualify for an exemption from the Medicare levy & you were ineligible for Medicare cover
 - Provide the "[Medicare Entitlement Statement](#)" letter as issued by the Department of Human Services

[#] Our office will be able to obtain this directly from the ATO in most circumstances



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DEDUCTIBLE WORK-RELATED EXPENSES

- **Car Travel claims** - Did you use your own car to travel between two or more places of work (in any given single trip)? Yes / No
 - If so, what was the **TOTAL KMs travelled for the Financial Year** (2+ workplaces in any given trip or carrying heavy equip. >20kgs)? _____ KM
 - What is the **Registration Number** of the car? _____ REGO
 - What was the **odometer** (approx.) reading at the **start** and **end** of the financial year? _____ KM / _____ KM
 - If you have kept a **12-week logbook** in the last 5 years? Confirm all car expenses & the logbook separately \$ _____ x Logbook _____ %
- **Travel costs** (e.g., when you are travelling between different workplaces; parking, tolls, train, cab fare etc – excluding home to work travel)? \$ _____
- Did you have to **Travel Overnight** for work purposes? Yes / No
 - What **expenses** did you incur during your overnight travel? \$ _____
 - How many **nights** did you stay overnight away from home? _____ Nights
 - Did you receive a **Travel Allowance** from your employer? Yes / No
 - Did you travel for **more than 6 nights** in a row away from home (please provide a travel diary)? Yes / No
- **Compulsory Uniform/Occupation-specific & Protective Clothing** expenses for work (excludes conventional clothing)? \$ _____
- **Laundry** - Do you wear compulsory uniform, occupation-specific, or protective clothing at work and wash it at home? Yes / No
- **Self-Education expenses**, related directly to your current role (which is not designed to obtain a new/better job)? Yes / No
 - If so, please provide the costs/car travel related to your self-education claim \$ _____ & _____ KM
- **Home Office*** - How many hours did you spend working from home (in total)? _____ HRS
 - Did you have a separately identifiable home office? Yes / No
- **Internet* expenses** (and please confirm what **percentage** was it used for work purposes)? \$ _____ x _____ %
- **Mobile/Telephone* expenses** (and please confirm what **percentage** was it used for work purposes)? \$ _____ x _____ %
- **Stationery, Printing, Books, Tools, Materials, Equipment** etc work-related expenses? \$ _____
 - If there are any items purchased for **more than \$300**, then please provide details of **date, amount, & item** separately \$ _____
- **Sun Protection** expenses, such as sunscreen, hats, etc (if you work outdoors)? \$ _____
- **Training, Seminars, Workshop** expenses? \$ _____
- **Union / Subscriptions / Software** expenses? \$ _____
- **Bank account fees** (for an account used to receive your income)? \$ _____
- **Income Protection** insurance costs? \$ _____
- **Donations/School Building Fund Levies?** (to a charity with 'deductible gift recipient' status – check www.abr.gov.au) \$ _____
- **Deductible Super contributions** (please provide a letter confirming your deduction from your super fund) \$ _____
- **Other work-related expenses?** (e.g. over-time meals under award, interest/dividend deductions, ATO GIC etc) \$ _____
- **Other considerations:**
 - Any Contracts of Sale for; properties/land, shares, bitcoin, precious metals, patents, options, rights, etc. Provided? Y / N
 - Any other additional Income & Expense reports/receipts for the tax year, e.g., business income, interest, rental, royalties, Uber/OLA, Uber Eats, Air BNB, other sharing economy income, minister's allowances, pensions, lump sums in arrears, taxable scholarships, annuities, dividends, foreign income, and other sales/gains. Provided? Y / N
 - Review private hospital cover details, pensioner offset, Medicare exemptions, & other offsets etc Provided? Y / N

NEW CLIENTS or where required for updating our files, please provide our office with your:

- Carried forward details from your previous Tax Return (such as carried forward Capital/Tax/Business Losses & Depreciation Reports) Provided? Y / N
- Previous year's tax agent fees (tax agent fees are tax deductible) \$ _____
- **Tax File Number (TFN)** _____ **Date of Birth (DOB):** _____
- **Driver's licence** or passport (a copy/photo is acceptable) Provided? Y / N
- Dates of any permanent arrivals/departures from Australia during the financial year? Arrival or Departure in Fin. Year _____ / _____ / 20
- Spouse income & details (Name, DOB, and date of marriage/deceased if in the last financial year) _____
- Number of dependent children in your care (under 18, or 25 if full time student)? Children# _____
- **Home Address** _____
- **Mobile Number** _____
- **Email Address** _____
- Your **Bank BSB & Account details** (for tax refunds to be deposited into) BSB _____ ACC _____

* a 4-week diary will be required by the ATO for the purposes of substantiating your claim. From 2023 the revised home office Fixed Rate Method requires your actual total hours recorded (e.g. via diary/timesheets), no longer requires a dedicated home office, & covers all internet costs, mobile/phone costs, electricity/gas/air-con/lighting costs, stationery/consumables (e.g. ink/paper). It excludes the following which you can separately claim a deduction for: technology equipment such as laptops/printers/routers, office furniture, repairs/maintenance of these items, & cleaning (only if you have a dedicated home office).

