

# Individual Tax Return Questionnaire

Year Ended 30<sup>th</sup> June 201\_ (Enter Year)



Please email, fax or post this form back to our office **PRIOR** to your appointment:

TO: Simon Jones & Co

FAX: (03) 9742 5644

ATTENTION:

E-MAIL: [accountant@sjc.com.au](mailto:accountant@sjc.com.au)

INFORMATION FOR TAX RETURN			
Name:			Spouse Name:
DOB:			Spouse DOB:
Address:			Postal Address:
TFN:			Email:
Phone:	W	H	M
CHILDREN			
Name:			Name:
DOB:			DOB:
School:	Primary/Secondary		School:
Education Costs:			Education Costs:
Name:			Name:
DOB:			DOB:
School:	Primary/Secondary		School:
Education Costs:			Education Costs:
PAYG PAYMENT SUMMARIES (Please Attach or Fax All Slips)			
Employer:	Occupation:	Gross:	Tax:
		\$	\$
		\$	\$
		\$	\$
BANK INTEREST			
Bank:	Amount:	TFN Credits:	Bank Charges:
	\$		
	\$		
WORK EXPENSES (Please Attach Detailed Listing)			
Work related tools:	\$	Self Education:	\$
(Eg. - tools of trade, calculators, electronic organisers, tablets, software)		(Eg. – course fees, student union fees, tutorial fees, text books, etc.)	
Details of Allowances Rec'd		Seminars/Prof Dev:	\$
Work Kilometres*	Refer separate form (see below)		Stationery:
Taxi Fares:	\$	Uniform:	\$
Other Travel:	\$	Union Fees:	\$
Books or Trade Journals:	\$	Sun Protection Items:	\$
Income Protection Insurance :	\$	Other : (Please detail)	
OTHER EXPENSES (Please Attach Detailed Listing)			
Donations	\$	Tax Agent Fees :	
Please note : Out of pocket medical expense claims are restricted to net eligible expenses for disability aids, attendant care or aged care from 1/7/2015 until 30/6/19			
DO YOU HAVE ANY OF THESE ITEMS?		<input type="checkbox"/> Eligible Home Office Expenses	
<input type="checkbox"/> Investment Income	<input type="checkbox"/> Rental Properties	<input type="checkbox"/> Investments Sold	<input type="checkbox"/> Motor Vehicles Used for Work
If so, then please download additional forms from			
<a href="http://www.sjc.com.au/our-resources/useful-links-and-forms/">www.sjc.com.au/our-resources/useful-links-and-forms/</a>			