

2021 Individual Income Tax Return

Name			
Home Address			
Postal Address			
TFN <i>*Not required for existing clients</i>		Date of Birth	
Mobile			
Bank Details			
Account Name:		Bank Name	
BSB		Account Number	
Employment			
<i>Please note: Your Income Summaries from employers will be available from MyGov</i>		Current Occupation <i>*Please provide a brief description</i>	
Other Income			
Did you have any other income during this period?		<i>If yes, please provide a description and provide details regarding the other income.</i>	
Income		Other Income Deductions	
Did you receive any income from a rental property? – <i>If yes please complete rental property worksheet.</i>			
Did you receive a distribution from a trust? Or managed investment trust? – <i>If yes please complete trust distribution worksheet.</i>			
Did you buy or sell any investment assets such as: Property, Shares or Crypto?			
Work-Related Travel Deductions			
<i>Please note this does not include travel to and from work. Travel can only be claimed when performing your employment duties</i>		Cost/Kms	Reason for travel or destinations
Number of Work KM's Travelled			
Taxi/Uber Fares			
Parking			
Home Office Questionnaire			
Do you have a dedicated home office? (<i>i.e., cannot be used for private or domestic purposes</i>)			
Can you home office area be readily converted back for domestic use?			
Are you required to work from home?			

Home Office Deductions			
Number of hours spent working from home		Approx. Portion of floor space attributable to home office area	
Home Office Running Costs? – <i>Please breakdown item and cost</i>			
Home Office Furniture – <i>Please provide a description including purchase price</i>			

Self- Education Expenses			
You can claim self-education and study expenses you incur when the course you take leads to a formal qualification and meets the following conditions:			
Was the self-education and study expenses maintaining or improving the specific skills or knowledge you require in your current employment activities?			
Was the self-education and study expenses likely to result in, an increase in your income from your current employment activities.			
Please provide a brief description of the course or seminars			
Conference/Seminars		Journals & Periodicals & Subscriptions	
Associated Travel		Associated Stationary	
Course Fees		Other Expenses	

Other Deductions			
Mobile Phone		Internet	
Work- Related Clothing		Computers & Software	
Protective Clothing		Occupation specific clothing	
Tools & Equipment		Dry Cleaning	
Stationary		Reference Materials	
Union Fees		Income Protection	

Donations	
Name of Organisation	Amount

Depreciable Expenses – Items Over \$300		
Item	Cost	Business Use %

I further confirm that:

- I. I am aware of the procedures to follow if a document is lost or destroyed.
- II. I may be required to verify any income or expense item noted in my return in the event of an ATO audit.
- III. I understand the Substantiation schedules I completed for all work, car and travel expense claims under self-assessment.
- IV. I understand that, for the purposes of obtaining “safe harbour” protection, it remains my responsibility to properly record matters relating to my tax affairs and to bring all of the relevant facts to your attention in order to show reasonable care; and
- V. I declare that:
 - a. I have disclosed, and you have returned, all of the income including net capital gains which I have earned/received, for the 2021 income year.
 - b. All income declared, claims for deductions and tax offsets/rebates included in my return are based on my specific instructions and advice that I satisfy the relevant taxation requirements.
 - c. I have all receipts or documentation necessary to substantiate the above claims and I will make them available if required by the Tax Office; and
 - d. You have clarified what written evidence (including car/travel records) will be required during an audit and penalties, (including prosecution) that may be applied if incorrect claims are identified in an audit situation.
 - e. I am aware of my land tax responsibilities and will be held accountable for all necessary registration and lodgement requirements.

X

Taxpayer



Scan here to complete this form online