

2009 Client tax return interview checklist

Date - Interviewer - Price Quoted -

Client Name:

Postal Address:

Address:

Date of birth:/...../.....

Tax File Number: ABN:

Telephone: (H) (W) (M)

Email:

Spouse details:

Dependants

Full Names

Date of birth

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INCOME – Please provide evidence

Occupation:

1. Salary or wages No of Group certificates.....

Employer ABN	Name	Tax Withheld	Gross	Allowances

4. Eligible termination payments YES/NO

5. Commonwealth of Australia government allowances like Newstart, youth allowance and Austudy payment YES/NO

6. Commonwealth of Australia Government pensions and allowances YES/NO

7. Other Australian annuities and superannuation income streams..... YES/NO

DEDUCTIONS – Please provide evidence

D1. Work-related car expenses

Cents per km	Log book	1/3 of actual expenses	12% of actual cost
MV Type			Rego
Kms Travelled		x (\$0.63 or \$0.74 or \$0.75) = \$.....	
Cost of Vehicle.....		Date of purchase.....	
Petrol.....		Rego & G/Slip.....	
Insurance.....		R & M.....	
Tyres & Battery.....		Finance Interest/Lease Pmts.....	
Log Book sighted? YES / NO		Business % to claim.....	

D2. Other work-related travel expenses

Do you have any travel expenses?..... YES/NO

Other work-related travel expenses, e.g., borrowed car YES/NO
(please specify)

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D3. Work-related uniform and other clothing expenses

Protective clothing	Occupation-specific clothing	Compulsory uniform
Laundry.....	Dry cleaning.....	
Purchases		
Other claims – mending/repairs, etc (please specify)		

D4. Work-related self-education expenses

Nexus

Course name..... Campus

Dates of study..... Trips per week

Travel Kms.....

Union fees.....	Course fees.....
Books & Texts.....	Stationery.....
Parking & Tolls.....	Other.....

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