

# Individual Tax Return Questionnaire

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



Here's a checklist to help you gather the receipts, tax invoices and supporting documentation you'll need to do your tax return. You may email or post this prior to your appointment. Feel free to contact us if you have any queries

TO: BHT Partners

ATTENTION: \_\_\_\_\_

E-MAIL: [bhtppl@bhtpartners.com.au](mailto:bhtppl@bhtpartners.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			