



Income	Y	N	Details
Are you a new client?			<i>If yes, please provide copy of driver's license or passport</i> Name: Address: Ph: DOB: TFN:
Did you earn income from Employment?			<i>We can access this via the ATO portal</i>
Did you receive Government Payments/allowances? (ie Centrelink)			<i>We can access this via the ATO portal</i>
Did you receive any Superannuation income/pension?			<i>If yes, please provide details</i>
Did you receive any Business Income? (Personal Services)			<i>If yes, please provide details</i>
Did you receive any income distributions? (ie. From a Partnership or Trust)?			<i>If yes, please provide details</i>
Did you receive any Bank interest?			<i>We can access this via the ATO portal</i>
Did you receive any income from dividends?			<i>We can access this via the ATO portal</i>
Do you have any Managed Funds/Trusts?			<i>If yes, please provide relevant documentation</i>
Did you purchase or sell any investments? including Shares , Property or Cryptocurrency ?			<i>If yes, please provide relevant documentation</i>
Did you receive any income from Rental Properties?			<i>If yes, please provide detailed summary including all outgoings</i>
Did you receive any foreign/overseas income?			<i>If yes, please provide details</i>

Deductions	Y	N	Details
Besides to and from work, did you use your car to travel from one workplace to another?			<i>If yes, please provide a logbook detailing all work-related travel?</i>
Do you use your mobile phone for work related purposes?			<i>If yes, how much is your monthly cost and what percentage do you use your phone for work?</i>
Do you use the internet for work related purposes?			<i>If yes, how much is your monthly cost and what percentage is used for work?</i>
Did you perform any work from home?			<i>If yes, how many hours per week?</i>
Did you take any leave? If so, how long and when?			<i>If yes, please provide details</i>
If you were not reimbursed by your employer, did you pay for any travel, self-education, or uniform expenses?			<i>If yes, please provide summary</i>
If you have paid for any union fees, subscriptions or memberships related to your employment.			<i>If yes, please provide summary</i>
Did you make any donations to a listed charity? (Please note, payment of raffle tickets to charitable organizations do not apply.)			<i>If yes, please provide summary</i>
If your tax return was prepared by another tax agent in the prior year, what was the tax agent fee?			<i>If yes, what was the fee?</i>

Deductions - Individuals (Please note the ATO requires you to keep a record of your claims with receipts for at least 5 years if your total deductions exceed \$300)

Other	Y	N	Details
Private Health Insurance Statement (Were you covered for the full financial year?)			<i>We can access this via the ATO portal</i>
Bank Loan Statements (including Home Loan and Investment Loan)			<i>If yes, please provide summary</i>
Do you currently have other Personal Insurances? (including Life, Trauma, TPD)			<i>If yes, please provide details</i>
Do you currently have Business insurances? (Public Liability, Property, Buy/Sell, Keyman)			<i>If yes, please provide details</i>
Did you have any dependents for this financial year?			<i>If yes, how many</i>

If you have a spouse for whom we are not preparing their return, what is their full name, date of birth and taxable income for the same financial year?	Full Name: TFN: D.O.B: Taxable Income:
Please provide us your bank account details (Should you receive a tax refund for your return)	BSB: Acc no: Acc Name:

(Please note - not all the Documents listed above will be applicable to your personal circumstances. You are only required to provide those Documents where applicable)

Please email your information to admin@adpartners.com.au

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