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## All Industries Form

Title: \_\_\_\_\_ First Name: \_\_\_\_\_ Middle Name: \_\_\_\_\_ Surname: \_\_\_\_\_

Date of Birth: \_\_\_\_\_ Address: \_\_\_\_\_ Suburb: \_\_\_\_\_ Postcode: \_\_\_\_\_

Mobile: \_\_\_\_\_ Alternate Contact: \_\_\_\_\_ Email Address: \_\_\_\_\_

Are you married or de facto?

Spouses Name: \_\_\_\_\_ Date of Birth: \_\_\_\_\_ Spouses Taxable Income: \_\_\_\_\_

Are they a P.H.A.T. Returns Client? \_\_\_\_\_ Do you have any dependents? If yes, how many? \_\_\_\_\_ Do you pay child support? If yes, how much? \_\_\_\_\_

Your Job: \_\_\_\_\_ Company: \_\_\_\_\_ Tax File Number: \_\_\_\_\_

Bank Account Details BSB: \_\_\_\_\_ Account number: \_\_\_\_\_ Name on account: \_\_\_\_\_

How much interest did you earn on bank accounts? \_\_\_\_\_ Did you receive any dividends? \_\_\_\_ If yes, please attach

Do you have a managed fund? \_\_\_\_\_ If yes, please attach parts A, B and C from your fund statement or tax return information

Did you sell shares? \_\_\_\_ If yes, attach all information regarding buying and selling of shares.

Do you have private health insurance? \_\_\_\_\_ If yes, please attach statement from your fund

Do you have a Higher Education Learning Program (HELP/HECS), Student Financial Supplement Scheme (SFSS) or Trade Support Loan (TSL) debt?

If yes, how much? HELP \_\_\_\_\_ SFSS \_\_\_\_\_ TSL \_\_\_\_\_ Do you have Debts to Centrelink/Family Assistance/ATO? \_\_\_\_\_

### Investment Property Information

Purchase date: \_\_\_\_\_ Purchase Price (less stamp duty): \_\_\_\_\_ Date first earned rental income: \_\_\_\_\_

Address: \_\_\_\_\_ Suburb: \_\_\_\_\_ Postcode: \_\_\_\_\_ Year of Construction: \_\_\_\_\_

Gross Rental Income: \_\_\_\_\_ Weeks rented: \_\_\_\_\_ Is this a shared rental? If so with whom: \_\_\_\_\_ Percentage split? \_\_\_\_\_

### Annual Expenses

Advertising: \_\_\_\_\_ Body Corporate: \_\_\_\_\_ Borrowing Fees: \_\_\_\_\_ Cleaning: \_\_\_\_\_ Council Rates: \_\_\_\_\_

Gardening: \_\_\_\_\_ Insurance: \_\_\_\_\_ Loan Interest: \_\_\_\_\_ Land Tax: \_\_\_\_\_ Pest Control: \_\_\_\_\_

Property Manager Costs(please attach annual report): \_\_\_\_\_ Repairs, maintenance: \_\_\_\_\_ Stationery/phone/postage: \_\_\_\_\_

Water Charges: \_\_\_\_\_ Other Rental Expenses: \_\_\_\_\_

Please attach your depreciation schedule or does P.H.A.T. Returns have already? \_\_\_\_\_

If you don't have one yet, call 1300 990 612 or click here

### ABN Information

ABN: \_\_\_\_\_ Trading name: \_\_\_\_\_  **Washington Brown** \_\_\_\_\_ Address: \_\_\_\_\_  
THE PROPERTY DEPRECIATION EXPERTS

ABN Total Revenue: \_\_\_\_\_ ABN Total Expenses(please attach profit and loss statement or list of expenses): \_\_\_\_\_

**Please email this form and receipts for purchases over \$300  
A MINIMUM OF 24 HOURS PRIOR TO YOUR BOOKING**