

TAX FORM 2023

PERSONAL DETAILS				
Existing OR New Client for TAX PURPOSE				
Title				
Surname				
Given Name				
Tax File Number (TFN)				
Residential Address in Australia				
Date of Birth				
Mobile Number				
Personal Email Address				
Account Holder's Name				
BSB Number			Account Number	
INCOME DETAILS				
Occupation/ Role/ Job title				
Gross Bank Interest Earned (Please mention details here or provide bank interest earned summary report for the financial year)		Bank 1	Bank 2	Bank 3
	Bank Name			
	Account Number			
	Interest Earned			
	Tax Withheld			
DEDUCTIONS (Only complete applicable fields)				
Please mention expenses where 1/ You spent money and was not reimbursed 2/ It is directly related to earning your income 3/ You have a record to prove it				
Work related Car Expenses	Car Make & Model		Vehicle Registration Charges	
	Registration No.		Vehicle Insurance	
	Car Purchase Date		Kms travelled for work	
	Car Purchase Price		Repairs and maintenance	
	Logbook or Spreadsheet record		Work Use %	
Work related other travel Expenses and description (Taxi, flights, public transport etc.)				
Work related uniform or protective clothing and Dry cleaning for uniform				
Self-education Expenses and Course Name (please supply invoice along with this form)				
Work from Home hours	Approx. hours Between July 2022 to Feb 2023			
	Actual hours between March 2023 to Jun 2023			

Work related product purchase such as Laptop, Computer, Printer, Furniture, iPad, phone etc (Please supply invoice along with this form)	Item Name	Date of Purchase	Amount	% Usage for work
Mobile Usage for work	Mobile Bill paid for the year		% Usage for work	
Home Internet Usage for Work	Home Internet Paid for the year		% Usage for work	
Electricity and gas paid for the financial year (FY)			Indicative % of home area used for home office	
Printing and Stationery for work (Computer Consumables)				
Cleaning (only if you have a dedicated home office)				
Deductible Donation / Charity				
Accountant fees paid Previous Year				

VISA DETAILS

Type of Visa & Eligibility for Medicare Card	
First Arrival Date in Australia during the FY (if applicable)	
Permanent Departure Date from Australia during the FY (if applicable)	

MEDICARE/ PRIVATE HEALTH INSURANCE DETAILS

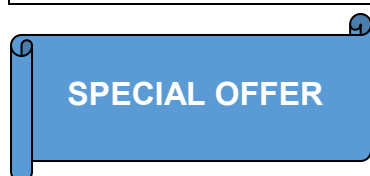
Do you have Medicare Card?	
If you become eligible to receive Medicare Card during FY, please advise the date	
Private health Insurance in Australia (If yes, please provide annual statement)	

SPOUSE DETAILS

Spouse Surname		
Spouse Given Name		
Spouse Date of Birth		
Did you have a spouse for the full year?		
The dates you had a spouse if not for full year	Date From	
	Date to	
Spouse's Gross Payment/income		
Spouse's Tax Withheld		
No. Of Dependent child living in Australia		

Sole Trader - ABN Income/ Expenses	
Australian Business Number (ABN)	
ABN Income (if any)	
Industry type	
Work related expenses for the business (Email receipts OR Spreadsheet along with the Bank Statement for the year)	

Other Information (Only related to Australia)	
Are you trading in shares, Cryptocurrency, or units in investment trusts? Yes/ No If yes, please share annual statement	
Do you own any investment property? Yes/No	
Any foreign Employment, Rental, interest, or dividend Income? Yes/No (you must declare if you are a PR or citizen)	
Please email Photo ID along with this form (Not required for existing clients)	such as Driver's licence or Passport
How did you hear about us?	
I _____ declare that the information provided to Tax Purpose is true and correct and I have all the required receipts and/or other proof to support my claims in preparation of my tax return.	



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Please tick below and will get in touch for further discussion.

Tax Planning

Home Loans/ Investment Loans / Refinancing / SMSF Loans

Self-Managed Super Fund (SMSF) Set up and Accounting

Company Set up and Payroll

Life Insurance and Income Protection Cover

Property Investments