

Tax Return Questionnaire

1. Personal Information

- Full legal name (first, middle, surname)
- Date of birth
- Tax File Number (TFN)
- Current residential address
- Postal address (if different)
- Has your name or address changed since last year's return?
- Are you an Australian resident for tax purposes?
- If not, what dates did you enter/leave Australia?

2. Income

- Did you earn any salary, wages, or allowances in Australia? (Attach PAYG summaries)
- Did you receive any Australian government allowances, pensions, or benefits?
- Did you earn any income overseas? (Provide employer name, country, income, currency, exchange rate, tax paid, deductible expenses)
- Did you receive any lump sums in arrears? (Provide year and amounts)
- Did you have any capital gains (property, shares, crypto)?
- Did you receive income from foreign assets valued at AUD \$50,000+?
- Did you have any interests in controlled foreign companies or trusts?
- Did you earn income from investments (dividends, interest)?
- Any rental property income or other business income?

3. Deductions

- Work-related expenses (travel, uniforms, tools, subscriptions, home office)
- Self-education expenses (related to current employment)
- Donations to registered charities
- Tax agent fees from last year
- Any deductible expenses linked to foreign employment?

4. Offsets & Rebates

- Do you have a spouse/partner? (Provide income details and private health insurance status)
- Do you have dependents? (Provide number and ages of children)

- Did you pay child support? (Provide total amount)
- Do you have private hospital health insurance? (Provide details of cover)

5. Superannuation

- Did your employer make reportable superannuation contributions above compulsory amounts?
- Did you personally contribute to superannuation and wish to claim a deduction?

6. Other Information

- Any reportable fringe benefits from your employer?
- Any tax-free government pensions?
- Any investment or rental property losses?
- Do you expect to claim the Medicare Levy Surcharge exemption?
- Do you have all receipts and documentation to support deductions and claims?