**Details of the Individual**

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| --- | --- |
| Financial Year Ended 30 June …. |  |
| Title (Mr/Mrs/Ms/Miss/Dr) |  |
| First Name |  |
| Middle Name/(s) |  |
| Surname |  |
| Email Address |  |
| Phone Number |  |
| Home Address |  |
| Postal Address (if different) |  |
| Date of Birth |  |
| City of Birth |  |
| Tax File Number |  |
| Main Occupation |  |
| Spouse Full Name (if any) |  |
| Spouse Date or Birth (if any) |  |
| Was spouse for full Year? (if any) |  |
| List All Dependent Children with Full Name and Date of Birth for each. If relevant, also indicate any that are in shared care with an ex-spouse, including your % of care. Please indicate if any of the dependents are legally disabled. |  |
| Bank Account For Any Refunds (mandatory for all clients) | Account Owner: BSB: Number:  |

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| **Questions – Must Answer All Questions** | **Answer****(“Y”, “N” or “N/A”)** | **Provide Comments Where Relevant** |
| If this is the first year we have prepared your tax return, provide a full copy of your previous year’s tax return. We will need this for carried forward items like depreciation and tax losses. |  |  |
| Did you receive any salary, wages, director’s fees or allowances from an employer (including any related employers)? If so, provide a list of employers in the comments column and attach a copy of all payment summaries when returning the questionnaire. |  |  |
| Did you receive any lump sums or termination payments from an employer or another source? If so, provide details. |  |  |
| Did you receive any payments from the government? E.g. newstart, youth allowance, parenting payments. If so, provide details. |  |  |
| Did you receive any superannuation pensions or lump sums or other annuities during the year? If so, provide details. |  |  |
| Did you earn any interest on bank accounts? If so provide bank name, account number, interest amount and any tax withheld for each account. Only include your share of the interest if held jointly with others. |  |  |
| Did you earn any dividends from private or public companies? If so provide details for each dividend including date paid, company name, franked, unfranked and imputation credit amounts. Also provide copies of dividend statements if possible. |  |  |
| Did you receive or sell shares under a formal Employee Share Scheme? If so, provide details. |  |  |
| Did you receive income from a partnership, trust or other investment not already mentioned? If so, please provide details and associated documents showing the distribution amounts. |  |  |
| Did you operate a business or farm as a sole trader? If so please complete the separate business questionnaire with the relevant details. Contact us if you don’t have a copy of the business questionnaire. |  |  |
| Did you sell any investments or capital assets during the year (e.g. shares, property, businesses, investments). If so, provide details of the sale proceeds as well as original purchase details and other costs during the holding period and at the time of sale. Provide documents substantiating all costs. |  |  |
| Did you receive any income from foreign sources? If so, provide details. |  |  |
| Did you earn rent income? If so, please complete a rental property questionnaire and provide all income and expense details |  |  |
| Did you receive income from any source not already mentioned? If so, provide full details and any associated documents. |  |  |
| Did you use a motor vehicle for work related purposes (excludes from home to work)? If so, write the car model and number of work related kilometres travelled during the year. Alternatively if you have kept a valid logbook provide details of all actual running costs. Running costs are only required if you have a valid logbook. If you are not sure please just ask us. |  |  |
| Did you incur any other travel expenses for work purposes (excluding home to work), including overnight accommodation, overnight meal, taxis, buses, tolls etc? If so, provide details. |  |  |
| Did you incur any uniform expenses during the year? If so, list each item separately. Uniforms typically have to be compulsory, protective or occupation-specific to be deductible. |  |  |
| Did you incur any costs for laundry of work-related uniforms? Provide details of actual payments to drycleaners and also provide an estimate of number of loads of washing you did yourself. |  |  |
| Did you incur any self-education expenses for a course relating to your current employment? Only include courses offered by an education institution such as a school, college, university or TAFE. If so, provide details. |  |  |
| Did you use a home-office for work related purposes? The office must be separate to the general living areas of your house. If so, provide an estimate of the number of hours you used the home-office for work-related purposes. |  |  |
| Did you incur any other work-related expenses not already mentioned? Examples may include: union fees, subscriptions, memberships, seminars, workshops, reference books, tools, equipment, computers, repairs, internet, phones etc. If so, provide full details.Note: only include the work-related proportion for any expenses that were partly private. E.g. “Mobile Phone @ 70% = $300”. |  |  |
| Did you incur interest on money borrowed for investments purposes? For example: shares, manage trusts etc. Do not include rental property interest as it is mentioned in a previous question. If so, provide full details of the interest and fees on the loan and the investment it relates to. |  |  |
| Did make any tax deductible gifts or donations? If so, provide full details. |  |  |
| Did you incur any expenses to manage your tax affairs? For example: tax return preparation, property depreciation reports, tax advice. If so provide full details. |  |  |
| Did you make any deductible personal super contributions? Do not include contributions by your employer or related parties. You can only claim a deduction if you have received confirmation of the deduction amount from the fund. If so, provide full details. |  |  |
| Did you pay any insurance premiums for income protection or sickness and accident policies? If so, provide full details. Do not include other insurance types such as life, trauma or permanent disability. |  |  |
| If you do not have income protection insurance would you like use to arrange an obligation free quote? |  |  |
| Were you exempt from medicare levy during the year? This would typically only be the case if you were a blind pensioner, defence force member or receiving sickness allowance from the government. If so provide full details. |  |  |
| Were you and all of you dependents (including your spouse) covered by private health insurance during the year? If so provide a copy of the annual statement from the insurer. |  |  |
| Did you and your dependents incur medical expenses for disability aids, attendant care of aged care during the year? If so, provide full details. |  |  |
| Did you pay child support during the year? If so, provide full details. |  |  |
| If this is the first year we have prepared your tax return, provide details of any carried forward tax or capital losses that you are aware of. |  |  |
| If you had a spouse or de-facto partner during the year please provide a full copy of their completed tax return, unless we are preparing it. |  |  |
| Is there anything else you think might be relevant to your tax return? Do you have any questions about your tax affairs that you want us to consider or provide advice upon? Write details here and provide any relevant documents. |  |  |

**Declaration**

In signing this declaration you understand that you must return a completed questionnaire for each entity and individual before Climax Business Strategies can prepare a fixed price proposal to undertake any agreed work. You understand that you are under no obligation at all until you receive, sign and return the subsequent fixed price proposal. All questions must be answered with either “Y”, “N” or “N/A” for the questionnaire to be valid.

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| --- | --- |
| **Name of Authorised Person** |  |
| **Signature** |  | *🡨 (If returning in word format type “Authorised”)* |
| **Date** |  |