2018 Individual Tax Return
Year End Questionnaire

Please take the time to complete this checklist as it is a very important part of the accounting process.

It helps you:

- Identify and provide the information we need to prepare Tax Return
- Minimise the queries from us during the preparation of your Tax Return
- Ensure we can complete your Tax Return in a timely manner

Please complete the Authorisation below as this authorises us to contact necessary organisations, (eg. your bank or insurance company) to obtain information that is required to complete your Tax Returns.

Authorisation

I authorise ROCG Perth (Insight Business Partners Pty Ltd) to complete the Income Tax Return for me for the 2018 financial year. I authorise ROCG Perth to obtain whatever information is required from third parties to complete the preparation of my Tax Return.

Client Signature: ....

Date: ....

In order to ensure you declare income from all sources and understand deductions under the Substantiation guidelines, please complete the following checklist. All questions must be answered. Where replies are in the affirmative details **must** be supplied.

Note: If you are an Insight Financial Partners client, we will liaise with them to obtain information that we have access to.

1. Income	Yes	No	N/A
Did you receive an Australian Government payment? (incl unemployment, sickness, parenting, mature age allowance or Austudy payment)			
Did you receive a Centrelink or Department of Veterans' Affairs payment? (incl aged, single parenting payment, carer payment)			
Did you receive any PAYG Payment Summaries? (incl salary, wages, commission, bonuses)			
What is your main occupation?			
Did you receive an eligible termination payment? This would occur because you retired, finished a job, received a payment from a super fund, received a payment from an approved deposit fund, changed your pension or annuity into a lump sum, or following the death of a person.			
Did you receive an Australian annuity or superannuation income stream?			
Did you receive an Australian superannuation lump sum payment?			
Did you receive an allowance or benefit or other salary or wage type income, e.g. car or travel allowance, tools, clothing or meal allowance, directors fees, tips etc.			
Did you receive any interest on bank or other accounts?			
Did you have any tax (TFN tax) deducted from this interest?			
Were you a partner in a partnership? If yes, we will need details of income and expenses or the completed partnership financial statement and tax return.			
Did you receive income as a beneficiary of a trust? This includes cash management, property, equity & other managed funds. If yes, please provide the Annual Tax Statement from the fund.			
Did you receive any income from carrying on a business, incl a primary production business? If yes, please provide details of income and expenses incurred.			
Have you sold/disposed of any assets during the year which could be subject to capital gains provisions? This includes shares, units in a unit trust, rental properties. If yes, please provide the offer and acceptance and final settlement statement for the purchase and sale.			
Did you acquire an asset during the year which could be subject to the capital gains tax provisions? If yes, please provide the purchase offer, acceptance and settlement statement for your cost base records.			
Did you have an interest in a foreign trust or controlled foreign company?			
Have you caused the transfer of any property or services to a non-resident trust estate?			
Did you have an interest in a foreign investment fund/life assurance policy?			
Did you receive any income from overseas as an Australian resident? This includes dividends, pensions, interest and employment.			

Did you receive any rental income from a rental property? Please provide annual managing agent summaries, expenses paid personally and loan documents.			
Did you receive any dividends?			
Did you receive a bonus from a short term friendly society or life assurance policy taken out after 27/8/1982?			
Did you receive any other income not mentioned above?			
2. Deductions (Please provide a detailed list)	**Yes**	**No**	**N/A**
Do you have any work related expenses?			
Motor vehicle expenses?			
Travel (air fare/accommodation/meals)?			
Uniform? Protective Clothing? Please indicate compulsory / non-compulsory/protective.			
Self education? Includes books, fees (excluding HELP) and travel.			
Union fees?			
Subscriptions?			
Books and Journals?			
Tools and Equipment?			
Income Protection Insurance?			
Seminars?			
Depreciation?			
Home office expenses? Includes phone/electricity Percentage ____ %			
Other expenses?			
Did you invest in the Australian film industry?			
Did you pay into a super fund? If yes: please provide name of fund, policy number and total amount paid.			
Do you have any expenses you can claim as deductions against dividend and interest income? (incl loan interest).			
Did you make any gifts or donations of $2 or more? (excludes raffle tickets).			
Do you have an undeducted purchase price of a pension or annuity?			
Do you have expenses for managing your tax affairs?			

3. Tax Offsets	Yes	No	N/A
Did you maintain a spouse (married or de facto and no children)? If yes, please provide spouses' income.			
Are you a sole parent and have sole care of a dependant child or student during the year and did not receive any payments from Centrelink?			
Are you eligible to claim a zone offset or overseas forces offset? If so, please provide location and dates residing in each zone.			
Are you eligible to claim any other offsets, e.g. net medical expenses, invalid relative 16 years or older; parents; housekeeper. Please note you will not be eligible to claim the net medical expense offset if you have not claimed any medical expenses in 2014/15, 2015/16 and 2016/17 years.			
Did you have private hospital cover? If yes please the annual statement as provided from your health insurance fund is **required**.			

4. Other	Yes	No	N/A
Are there any issues that you would like to discuss with us further?			
Did you become a resident of Australia or cease to be a resident of Australia during the year? If yes, please provide details.			
Medicare Levy – Do you consider that you are eligible for the Medicare Reduction or Exemption (defence force arrangements, repatriation arrangements, blind pensioner/sickness allowance from DSS, non-resident of Australia, and member of a diplomatic mission in Australia).			
Did you pay any PAYG instalments to the Tax Office during the last financial year?			
HELP/Student Financial Assistance Supplement Scheme Loans/Statements?			
Did you earn over $250,000 during the 2017/18 year? If yes please be aware that you maybe liable for an extra 15% tax on super contributions. This can be paid personally or through your super fund, the ATO will send you documentation once your tax return is assessed.			
If you are a new client – please provide a copy of last year's tax return and Notice of Assessment.			

Financial Planning Issues	Yes	No	N/A
You may be an existing client of Insight Financial Partners Pty Ltd, our financial planning division, or may be interested in enquiring about our services. If you would like a review at the same time that your tax return is being prepared, please book an appointment with us. If you need an initial consultation on your personal financial planning issues at no cost or obligation, please attach the following:			
• Summary of personal assets/liabilities			
• Home loan statements for the last 12 months			
• Personal insurance – copy of life, trauma, TPD or income protection insurance policies or premium notices			
• Estate Planning – copy of will/Power of Attorney			
• Investments – summary of shares, real estate and other investments with original purchase dates and costs for CGT purposes			
• Super Fund – copy of personal members statements for all funds held (incl family members we can help)			
• Finance documents – copies of current HP, Lease or Chattel Mortgage contracts/documents for vehicles or other assets			
Would you like someone to contact you with regard to financial planning?			
Insight Financial Partners Pty Ltd is a member of Count Financial Ltd t/a Count Wealth Accountants AFS Licence No 227232. We specialise in Financial Planning, Investment Reviews, Personal Insurance, Online Broking, Superannuation, Home and Investment Loans, Business Loans and Leasing			

Update of Address Details

To ensure that our records are up to date, please provide us with any UPDATE of the following details:

Person to Contact with Queries:	
Physical Address:	
Postal Address:	
Primary Email:	
Home Phone:	
Work Phone:	
Mobile Phone:	
Fax:	
Twitter Profile:	
LinkedIn Profile:	

SUBMIT