

Individual Income Tax Return 2023

Thank you for engaging Solved Business & Taxation to prepare your 2023 Income Tax Return. This questionnaire is required to be completed to confirm your personal details on file with us, and to collect the information required for the preparation of your 2023 tax return. Please note that this is a broad questionnaire, and some questions may not be applicable to you.

SECTION 1 – PERSONAL DETAILS

Please enter your name, and complete the other lines only if there have been any changes since your last tax return submission:

| Personal Details |
|------------------|
| First Name |
| Family Name |
| Address |
| Email |
| Phone Number |
| Occupation |

Please note:

To counter the increased risk of fraud and identity theft new security measurements were introduced by the Australian Taxation Office and other government agencies. Therefore, we are now required to verify the identity of all new and existing clients and might ask for identification documents. However, we will not retain a copy of the identity documents provided by you.

Business Details (if applicable)

Do you run your business as...
Sole trader
Company
Partnership
Trust

ABN

Business Name

Trading Name

Director ID

Bank Details

Bank

Account Name

BSB

Account Number

Family Information

Spouses Name

Spouses DOB

Spouses 2023 Taxable Income

Number of Dependents

Did your family situation change during the 2023 financial year?

SECTION 2 – INCOME AND EXPENSES

Please answer where applicable, we may request further information.

General

Have you received notification that your income statements are finalised?

Did you (and your spouse) hold private health insurance for the entire financial year?

Have any work-related expenses been reimbursed by your employer?

Income

Interest on Bank Accounts

Dividend Income

Trust/Partnership Income

Employee Share Benefits

Superannuation Benefits

Government Benefits

Have you sold or disposed of any investments such as shares, property or crypto currency?

Have you received any rental income or made your property available to rent? (Includes HomeSharing such as Airbnb)

Have you received any foreign income? (e.g. Interest on overseas bank accounts, foreign dividends)

Have you received any other income?

Motor Vehicle Expenses

Work related kilometres (on average per week/month or total for year)

Model of car & make

Fuel Cost

Car Service & Repairs Cost

Car registration Cost

Other Car Expenses

Work Related Expenses

Computer Equipment

Office Furniture

Printing & Stationary

Postage

Subscriptions

Other Office Expenses

Phone (cost per month & % used for business)

Internet (cost per month & % used for business)

Travel/Meeting Expenses

Dry Cleaning

Protective Clothing and Products

Education/Courses

Other work-related expenses

Other Expenses

Please advise the hours worked from home per week on average

Details of any donations made to charities

Details of any personal superannuation contributions made. Did you provide the fund with a notice of intent to claim a deduction for the contribution, and receive an acknowledgement from the fund?

Amount paid to have your last tax return prepared (if not done by Swann / Solved)

Income Protection

SECTION 3 – OTHER INFORMATION

Other Information

Please provide details of any other information we require to complete your tax return

| | |
|---------------------|--|
| Name of client | |
| Signature of client | |
| Date | |