



# CAPITOL GROUP ADVISERS

Accountants and Financial Planners

## 2017 Individual Income Tax Return Information Sheet

<b>Full Name</b>	
<b>Tax File Number</b>	
<b>Date of Birth</b>	
<b>ABN (if applicable)</b>	
<b>Address</b>	
<b>Postal address (if different)</b>	
<b>Telephone</b>	<b>Mobile:</b>
	<b>Business hours:</b>
	<b>After hours:</b>
<b>Email</b>	
<b>Electronic banking details for Refund (if applicable)</b>	<b>Name of Account:</b> <b>BSB:</b> <b>Account Number:</b>
<b>Main Occupation</b>	

Please circle **YES** or **NO** for each of the items listed below and provide relevant details (if known) where prompted.

**INCOME – Please provide evidence**

1. Salary or wages ..... YES/NO
2. Allowances, earnings, tips, director’s fees etc ..... YES/NO
3. Employer lump sum payments ..... YES/NO
4. Employment termination payments ..... YES/NO
5. Australian Government allowances and payments like Newstart, youth allowance and Austudy payments ..... YES/NO
6. Australian Government pensions and allowances ..... YES/NO
7. Australian annuities and superannuation income streams ..... YES/NO
8. Australian superannuation lump sum payments ..... YES/NO
9. Attributed personal services income ..... YES/NO
10. Gross Interest ..... YES/NO
11. Dividends ..... YES/NO
12. Employee share schemes ..... YES/NO
13. Distributions from partnerships and/or trusts ..... YES/NO
14. Personal services income (PSI) ..... YES/NO
15. Net income or loss from business (as a sole trader) ..... YES/NO
16. Deferred non-commercial business losses ..... YES/NO
17. Net farm management deposits or repayments ..... YES/NO
18. Capital gains ..... YES/NO
19. Foreign entities:
  - Direct or indirect interests in a controlled foreign company ..... YES/NO
  - Transfer of property or services to a non-resident trust ..... YES/NO
20. Foreign source income (including foreign pensions) and foreign assets or property ..... YES/NO
21. Rent ..... YES/NO
22. Bonuses from life insurance companies or friendly societies ..... YES/NO
23. Forestry managed investment scheme income ..... YES/NO
24. Other income (please specify below) ..... YES/NO

**DEDUCTIONS – Please provide evidence**

**D1. Work related car expenses**

- Cents per kilometre method (up to a maximum of 5,000 kms) ..... YES/NO
- Log book method ..... YES/NO

**D2. Work related travel expenses**

- Employee domestic travel with reasonable allowance ..... YES/NO
- If the claim is more than the reasonable allowance rate, do you have receipts for your expenses? ..... YES/NO
- Employee Overseas travel with reasonable allowance ..... YES/NO
- If the claim is more than the reasonable allowance rate, do you have receipts for expenses? ..... YES/NO
- If travel is for 6 or more nights in a row, do you have travel records? (e.g. a travel diary) ..... YES/NO
- Employee without a reasonable travel allowance ..... YES/NO
- Did you incur and have receipts for airfares? ..... YES/NO
- Did you incur and have receipts for accommodation? ..... YES/NO
- Do you have receipts for hire cars (if applicable)? ..... YES/NO
- Did you incur and have receipts for meals and incidental expenses? ..... YES/NO
- Do you have any other travel expenses? ..... YES/NO
- Other work-related travel expenses (e.g. a borrowed car) ..... YES/NO
- (please specify) .....
- .....

**D3. Work related uniform and other clothing expenses**

- Protective clothing and/or footwear ..... YES/NO
- Occupation specific clothing ..... YES/NO
- Non-compulsory uniform ..... YES/NO
- Compulsory uniform ..... YES/NO
- Conventional clothing ..... YES/NO
- Laundry expenses (up to \$150 without receipts) ..... YES/NO
- Dry cleaning expenses ..... YES/NO
- Other claims such as mending/repairs, etc (please specify) ..... YES/NO
- .....
- .....

**D4. Work related self-education expenses**

*Course taken at educational institution:*

- union fees ..... YES/NO
- course fees ..... YES/NO
- books, stationery ..... YES/NO
- depreciation ..... YES/NO
- travel ..... YES/NO
- other (please specify) ..... YES/NO

**D5. Other work-related expenses**

- Home office expenses ..... YES/NO
- Computer and software ..... YES/NO
- Telephone/mobile phone ..... YES/NO
- Internet fees ..... YES/NO
- Tools and equipment ..... YES/NO
- Stationery ..... YES/NO
- Subscriptions and union fees ..... YES/NO
- Journals/periodicals ..... YES/NO
- Depreciation ..... YES/NO
- Sun protection products (i.e., sunscreen and sunglasses) ..... YES/NO

*Seminars and courses not at an educational institution:*

- course fees ..... YES/NO
- travel ..... YES/NO
- other (please specify) ..... YES/NO
- Overtime meals (if an allowance has been received) ..... YES/NO
- Any other work-related deductions (please specify) ..... YES/NO

**Other types of deductions**

- D6. Any new assets purchased ..... YES/NO
- D7. Interest deductions ..... YES/NO
- D8. Dividend deductions ..... YES/NO
- D9. Gifts or donations ..... YES/NO
- D10. Cost of managing tax affairs ..... YES/NO

- D11. Deductible amount of undeducted purchase price of a foreign pension or annuity ..... YES/NO
- D12. Personal superannuation contributions ..... YES/NO
- Full name of fund: ..... Account no: .....
- Fund ABN: ..... Fund TFN: .....
- Do you pass the 10% test? ..... YES/NO
- Have you provided the fund a notice of intention to deduct the contribution? ..... YES/NO
- Has this notice been acknowledged by the fund? ..... YES/NO
- D13. Deduction for project pool ..... YES/NO
- Forestry managed investment scheme deduction ..... YES/NO
- Other deductions, such as Income Protection Insurance (please specify) ..... YES/NO
- .....
- L1. Tax losses of earlier income years ..... YES/NO

**Tax offsets/rebates – Please provide evidence**

- T1. Are you a senior Australian or pensioner? ..... YES/NO
- T2. Did you receive an Australian superannuation income stream? ..... YES/NO
- T3. Did you make superannuation contributions on behalf of your spouse? ..... YES/NO
- T4. Did you live in a remote area of Australia or serve overseas with the Australian Defence Force or the UN armed forces? ..... YES/NO
- T5. Did you have net medical expenses over \$2,299 or \$5,423 (depending on ATI) in relation to disability aids, attendant care or aged care expenses? ..... YES/NO
- T6. Did you maintain a dependant who is unable to work due to invalidity or carer obligations? ..... YES/NO
- T7. Are you entitled to claim the landcare and water facility tax offset? ..... YES/NO
- T8. Other non-refundable tax offsets (please specify) ..... YES/NO
- .....
- T9. Other refundable tax offsets (please specify) ..... YES/NO
- .....

## Other relevant information

### Medicare levy and Medicare levy surcharge

- A. Are you entitled to the Medicare levy exemption or reduction? YES/NO  
(If yes, please specify): .....
- B. For the entire income year, were you and all of your dependents (including your spouse) covered by the appropriate private health insurance hospital cover? ..... YES/NO
- C. (If yes, please provide the Annual Statement received from your health fund)
- D. Were you under the age of 18 on 30 June 2017? ..... YES/NO
- E. Did you become an Australian tax resident at any time during the 2017 income year?..... YES/NO
- F. Did you cease to be an Australian tax resident at any time during the 2017 income year?..... YES/NO
- G. Did you make a non-deductible (non-concessional) personal super contribution in 2017?..... YES/NO
- H. Did a trust or company distribute income to you in respect of which family trust Distribution tax was paid by the trust or company?..... YES/NO
- I. Do you have a HECS/HELP liability or a TSL, SSL or SFSS loan debt? ..... YES/NO
- J. Do you have a loan with a private company or have such a loan amount forgiven? ..... YES/NO  
(If yes, please supply details in consideration of deemed dividend under Division 7A)
- K. Did you receive any benefit from an employee share acquisition scheme? ..... YES/NO

### Income tests information

- Do you have any total reportable fringe benefits amounts? ..... YES/NO
- Do you have any reportable employer superannuation contributions? ..... YES/NO
- Did you receive any tax-free government pensions? ..... YES/NO
- Did you receive any target foreign income? ..... YES/NO
- Did you have a net financial investment loss? ..... YES/NO
- Did you have a net rental property loss? ..... YES/NO
- Did you pay child support? ..... YES/NO
- Do you have dependent children?..... YES/NO  
If yes, how many? .....

### Spouse details – married or de facto (including same sex)

1. Did you have a spouse for the full year from 1 July 2016 to 30 June 2017? ..... YES/NO
  - If you had a spouse for only part of the income year, please specify the dates between 1 July 2016 to 30 June 2017 when you had a spouse:  
From ...../...../..... to ...../...../.....
2. Did your spouse die during the 2017 income tax year? ..... YES/NO
3. What is your spouse's name and date of birth? (If you had more than one spouse during 2017, provide the name of your spouse on 30 June 2017 or your last spouse)  
Name: .....  
DOB: .....
4. Did your spouse (named above) have taxable income for the 2016 income year? ..... YES/NO  
If yes, what was the amount? \$ .....
5. Did your spouse have a share of trust income on which the trustee is assessed under S.98 of the ITAA36 not included in your spouse's taxable income for 2017 ..... YES/NO  
If yes, what was the amount? \$ .....
6. Did a trust/company distribute income to your spouse in 2017 in respect of which family trust distribution tax was paid by the trust/company? ..... YES/NO  
If yes, what was the amount? \$ .....
7. Did your spouse have reportable fringe benefits amounts for the 2017 income year? ..... YES/NO  
If yes, what was the amount? \$ .....
8. Did your spouse receive any Australian Government pensions or allowances (not including exempt pension income) in the 2017 income year? ..... YES/NO  
If yes, what was the amount? \$ .....
9. Did your spouse receive any exempt pension income in the 2017 income year? ..... YES/NO  
If yes, what was the amount? \$ .....
10. Does your spouse have any reportable super contributions for the 2017 income year? ..... YES/NO  
If yes, what was the amount? \$ .....
11. Did your spouse receive any tax-free government pensions paid under the Military Rehabilitation and Compensation Act 2005? ..... YES/NO  
If yes, what was the amount? \$ .....
12. Did your spouse receive any 'target foreign income' in the 2017 income year? ..... YES/NO  
If yes, what was the amount? \$ .....
13. Did your spouse have a total net investment loss (i.e. the financial investment loss/rental property loss) for 2017 ..... YES/NO  
If yes, what was the amount? \$ .....

14. Did your spouse pay child support during 2017 ..... YES/NO  
If yes, what was the amount? \$ .....
15. If your spouse is 55 to 59 years old, did they receive a superannuation lump sum (other than a death benefit) during the 2017 income year which included a taxed element that does not exceed their low rate cap? ..... YES/NO  
If yes, what was the amount? \$ .....

Dated:

.....  
Signature of taxpayer

.....  
Name (print)