

## Personal Tax Return Questionnaire

### INCOME SUMMARY

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4.	Australian Annuity or Superannuation Pension
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# Personal Tax Return Questionnaire

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To assist us in preparing your income tax return, would you please use this questionnaire as a checklist when you compile your information.

With respect to your income, please keep in mind that the Australian Taxation Office has the ability to check your return income against independent sources. In particular, this applies to PAYG Payment Summary income, interest received and dividends.

For deductions, keep in mind that self-assessment applies. In the event of a Tax Office audit you will need to be able to substantiate the deductions claimed.

Finally, if you have sold any assets during the year please provide full details so we can determine whether Capital Gains Tax may apply to the transaction.

## For the front cover of the return

Full name: \_\_\_\_\_

Home address: \_\_\_\_\_

Your occupation: \_\_\_\_\_

Date of birth: \_\_\_\_\_

Spouse's name: \_\_\_\_\_

Spouse's date of birth: \_\_\_\_\_

Do you wish to use electronic funds transfer? Yes  No

If yes, we will then require the following information:

Bank and Branch: \_\_\_\_\_

Account name: \_\_\_\_\_

BSB number: \_\_\_\_\_ Account number: \_\_\_\_\_

Please provide your spouse's tax file number and taxable income if we do not prepare his or her income tax return:

Spouse's Tax File No.: \_\_\_\_\_

Spouse's Taxable Income: \_\_\_\_\_

Tax refunds and payments can be made via electronic funds transfer. It should be noted that this electronic funds transfer authority can be cancelled for future payments of tax.

<b>1.0 If we are preparing your return for the first time please provide ...</b>		<b>Yes</b>	<b>No</b>
1.1	Copy of your last tax return, taxation assessment and PAYG instalment notices	<input type="checkbox"/>	<input type="checkbox"/>
1.2	Copies of any other correspondence with the Tax Office such as Objections, Penalties, Statement of Account, Garnishee Notice, Final Notice to Lodge	<input type="checkbox"/>	<input type="checkbox"/>
<b>2.0 Income</b>		<b>Yes</b>	<b>No</b>
2.1	Attach PAYG Payment Summary from employment	<input type="checkbox"/>	<input type="checkbox"/>
2.1	PAYG Payment Summary detailing Government allowances and/or pensions	<input type="checkbox"/>	<input type="checkbox"/>
2.2	Have you been employed during the year and not received a PAYG Payment Summary?  If Yes please attach details of each employer's name, address, telephone number(s), address where work completed if different to address of the employer, period(s) of employment, Gross Earnings, Allowances, PAYG withheld and Reportable Fringe Benefits amount.	<input type="checkbox"/>	<input type="checkbox"/>
<b>3.0 Eligible Termination Payments</b>		<b>Yes</b>	<b>No</b>
3.1	ETP Payment Summary Statements	<input type="checkbox"/>	<input type="checkbox"/>
<b>4.0 Australian Annuity or Superannuation Pension</b>		<b>Yes</b>	<b>No</b>
4.1	Have you received any income from an Australian Annuity or Superannuation Pension? If Yes, please provide the following information:	<input type="checkbox"/>	<input type="checkbox"/>
4.1.1	PAYG Payment Summary statement	<input type="checkbox"/>	<input type="checkbox"/>
4.1.2	Details of your un-deducted purchase price, if any	<input type="checkbox"/>	<input type="checkbox"/>
<b>5.0 Allowances, Benefits and Other Salary and Wages income</b>		<b>Yes</b>	<b>No</b>
5.1	Have you received any allowances, benefits and other salary not on your PAYG Payment Summary? If Yes, please provide any statements, letters or other documentation relating to the allowance, benefit or other income.	<input type="checkbox"/>	<input type="checkbox"/>
<b>6.0 Interest</b>		<b>Yes</b>	<b>No</b>
6.1	Have you received or been credited with interest from any source within Australia? If Yes, please attach the following information:	<input type="checkbox"/>	<input type="checkbox"/>
6.1.1	Name of bank or financial institution that paid you the interest	<input type="checkbox"/>	<input type="checkbox"/>
6.1.2	The branch/address where the account is held	<input type="checkbox"/>	<input type="checkbox"/>
6.1.3	The account number	<input type="checkbox"/>	<input type="checkbox"/>
6.1.4	Details of any TFN tax deducted from your interest	<input type="checkbox"/>	<input type="checkbox"/>
6.1.5	Details of interest paid or credited to the above accounts	<input type="checkbox"/>	<input type="checkbox"/>
6.1.6	Name of the account (i.e. held in your name only or joint names).	<input type="checkbox"/>	<input type="checkbox"/>
Note:	TFN tax is deducted from your interest when your tax file number has not been provided to your financial institution.		

<b>7.0 Income from a Trust or Partnership</b>		<b>Yes</b>	<b>No</b>
7.1	Have you received or are you entitled to receive a distribution of income or loss from a trust or partnership? If Yes, please provide the following information:	<input type="checkbox"/>	<input type="checkbox"/>
7.1.1	Statements detailing income distributed from the partnership or trust	<input type="checkbox"/>	<input type="checkbox"/>
7.1.2	Any deductions you can claim against this income	<input type="checkbox"/>	<input type="checkbox"/>
7.1.3	Imputation Credits, TFN tax credits	<input type="checkbox"/>	<input type="checkbox"/>
7.1.4	Tax file number of the partnership or trust. If it is a public trust (e.g. Bankers Trust) no TFN is needed	<input type="checkbox"/>	<input type="checkbox"/>
7.1.5	Details of tax free, tax deferred or non taxable distributions from trusts	<input type="checkbox"/>	<input type="checkbox"/>
<b>8.0 Income from Business</b>		<b>Yes</b>	<b>No</b>
8.1	Have you entered into any Voluntary Withholding Agreements? If Yes, then please provide Payment Summary.	<input type="checkbox"/>	<input type="checkbox"/>
8.2	Provide details of income and expenditure related to your business activity. Attach a summary or provide a USB Stick or CD with your files.	<input type="checkbox"/>	<input type="checkbox"/>
<b>9.0 Foreign Income</b>		<b>Yes</b>	<b>No</b>
9.1	Do you receive income from a foreign pension or annuity? If Yes, please provide details of the income received (in Australian dollars, if known)	<input type="checkbox"/>	<input type="checkbox"/>
9.2	Have you received any income resulting from foreign employment (salary, wages, commission, bonus)?  If Yes, please provide pay slips or foreign tax assessments and the period you were employed in the foreign country.	<input type="checkbox"/>	<input type="checkbox"/>
9.3	Have you received or been credited (reinvested) with any of the following type of income:		
9.3.1	Interest	<input type="checkbox"/>	<input type="checkbox"/>
9.3.2	Royalties, dividends or rent	<input type="checkbox"/>	<input type="checkbox"/>
9.3.3	Any other foreign income	<input type="checkbox"/>	<input type="checkbox"/>
9.3.4	Money from the sale of foreign assets (Such as property or shares)  Note: If you have received money from the sale of foreign assets please provide information as detailed under 10.0 Capital Gains/Losses section.  If Yes to 9.3.4, please provide the following information:	<input type="checkbox"/>	<input type="checkbox"/>
9.3.4.1	Details of the income and related expenditure	<input type="checkbox"/>	<input type="checkbox"/>
9.3.4.2	Details of any tax credits paid on the foreign income	<input type="checkbox"/>	<input type="checkbox"/>
9.3.4.3	Is this income banked to a foreign bank account?	<input type="checkbox"/>	<input type="checkbox"/>
9.3.4.4	Is this income remitted back to you in Australia?	<input type="checkbox"/>	<input type="checkbox"/>

10.0	Capital Gains/Losses	Yes	No
10.1	Have you sold or disposed of any assets such as a property or shares? Note: The description of asset above is very broad and is not limited to the following:	<input type="checkbox"/>	<input type="checkbox"/>
10.1.1	Shares, options, futures, units	<input type="checkbox"/>	<input type="checkbox"/>
10.1.2	Property	<input type="checkbox"/>	<input type="checkbox"/>
10.1.3	Currency of a foreign country	<input type="checkbox"/>	<input type="checkbox"/>
10.1.4	Artwork, jewellery, rare manuscripts or books, stamps, coins, medallions, antiques	<input type="checkbox"/>	<input type="checkbox"/>
10.1.5	Other personal assets that have been sold for more than \$10,000	<input type="checkbox"/>	<input type="checkbox"/>
10.1.6	Equipment or plant owned personally	<input type="checkbox"/>	<input type="checkbox"/>
10.1.6	Goodwill on the sale of a business (share in company, partnership interest etc)	<input type="checkbox"/>	<input type="checkbox"/>
	Note: Motor vehicles are exempt from CGT, but may be subject to a balancing adjustment, so the information below will still be required.		
10.2	If you have sold or disposed of any of the assets above please provide the following information for each:		
10.2.1	Identify the asset	<input type="checkbox"/>	<input type="checkbox"/>
10.2.2	Date of purchase (date the contract was signed)	<input type="checkbox"/>	<input type="checkbox"/>
10.2.3	Cost of purchase (Purchase price, legals, stamp duty etc)	<input type="checkbox"/>	<input type="checkbox"/>
10.2.4	Details of any additions to that investment (Additional costs incurred)	<input type="checkbox"/>	<input type="checkbox"/>
10.2.5	Date of Sale (date the contract was signed)	<input type="checkbox"/>	<input type="checkbox"/>
10.2.6	Sale details (include costs of sale, legals, advertising etc)	<input type="checkbox"/>	<input type="checkbox"/>
	Note: Capital gains tax records must be kept for a period of 5 years from the <i>date of disposal</i> of the asset.		

11.0	Rental Income	Yes	No
11.1	Have you received rental income or made your property available for rental? If Yes, please provide the following information for each rental property:	<input type="checkbox"/>	<input type="checkbox"/>
11.1.1	Rent received during the year, including rental received and held by your agent at 30 June.	<input type="checkbox"/>	<input type="checkbox"/>
11.1.2	For first year claims – cost of purchase/construction of property, date when purchased/constructed	<input type="checkbox"/>	<input type="checkbox"/>
11.1.3	Details of interest paid on money borrowed to purchase the property	<input type="checkbox"/>	<input type="checkbox"/>
11.1.4	Details of all other expenses relating to your rental property	<input type="checkbox"/>	<input type="checkbox"/>
	Note: The following expenses are generally deductible: advertising for tenants, agent's commission & letting fees, rates, repairs and maintenance, insurance, body corporate fees, borrowing expenses, depreciation of furniture and fittings, travelling to inspect the property.		

12.0	Dividends	Yes	No
12.1	Have you received or been credited (reinvested) with any dividends from companies in Australia? If Yes, please provide dividend advice slips received during the financial year.	<input type="checkbox"/>	<input type="checkbox"/>

13.0	Bonuses from Life Assurance or Friendly Society Bonds	Yes	No
13.1	Have you received a bonus or surrendered, terminated or forfeited a life assurance or friendly society bond? If Yes, please provide details of your policy and/or the bonus advice.	<input type="checkbox"/>	<input type="checkbox"/>

## Deductions

14.0	Motor Vehicle Expenses	Yes	No
14.1	Do you have any motor vehicle expenses relating to your work?	<input type="checkbox"/>	<input type="checkbox"/>
14.2	Do you have a current logbook (i.e. kept for 12 continuous weeks during the past four years)?  If Yes, please provide the business percentage ascertained from your 12 week logbook.	<input type="checkbox"/>	<input type="checkbox"/>
14.3	Have you travelled greater than 5,000 business kilometres this financial year?  If No, please provide the number of business kilometres travelled.  Note: Business kilometres are kilometres travelled in relation to earning income but excludes travel between home and work even if the trip is made more than once a day. Picking up the mail on the way to work or home cannot be included. The exception to this home to work rule is if your vehicle is required to carry bulky tools or equipment or your home is your base of employment. Please contact us to discuss if you have any queries regarding this claim.	<input type="checkbox"/>	<input type="checkbox"/>
14.4	Total expenses for fuel and oil, interest, leasing, registration, insurance, repairs and maintenance	<input type="checkbox"/>	<input type="checkbox"/>
14.5	To make a claim for vehicle depreciation we will require:		
14.5.1	Date the motor vehicle was purchased	<input type="checkbox"/>	<input type="checkbox"/>
14.5.2	Description of the motor vehicle, including engine capacity (e.g. 2 Litre)	<input type="checkbox"/>	<input type="checkbox"/>
14.5.3	Details of purchase costs and additional items  Note: Please contact us if you would like to know more about making a claim for motor vehicle expenses.	<input type="checkbox"/>	<input type="checkbox"/>

15.0	Travel Expenses	Yes	No
15.1	Do you undertake travel in relation to your employment?	<input type="checkbox"/>	<input type="checkbox"/>
15.2	Did you receive a travel allowance and are your claims limited to the reasonable allowance amount?	<input type="checkbox"/>	<input type="checkbox"/>
15.2.1	If Yes to 15.2 and you had overseas travel for 6 or more nights did you maintain a diary of your travel activities?	<input type="checkbox"/>	<input type="checkbox"/>

15.2.1.1 If No to 15.2.1, have you maintained written evidence of all travel costs claimed?

15.2.1.2 If No to 15.2.1, did you maintain a diary of your travel activities where domestic or overseas travel was for 6 or more nights in a row?

Note: The following details are required to be kept: nature of the activity, the date and approximate time when the activity began and how long it lasted, and where the activity took place. If a detailed itinerary was provided this provides an adequate travel diary

15.3 Please provide the following details in relation to your travel:

15.3.1 Have you provided costs associated with the travel (air fares, transport, accommodation)? (Please provide us with the receipts)

15.3.2 Have you provided details of any person(s) who accompanied you?

15.3.3 Purpose of the travel

**16.0 Self Education Expenses** **Yes** **No**

16.1 Did you complete any self-education courses?

16.1.1 If Yes, will this course help you into a **new** field or help you to obtain a new type of job?

Note: If you answered Yes to 16.1.1, you cannot claim for self-education expenses. Please go to Question 17.0.

16.2 Will this course help you to obtain a formal qualification?

16.3 Is there a direct connection between your self-education and your current work activities?

If you answered Yes to 16.2 and 16.3, the expenses that may be claimed include textbooks, stationery, student union fees, travel and depreciation (for example, computer, home office furniture). Also provide details of travel expenses from university to home.

Note : Payment of HECS, Open Learning fees, or AUSTUDY loan repayments are not tax deductions.

**17.0 Work Related Clothing** **Yes** **No**

A claim can be made for the cost of buying, renting, repairing or cleaning the following types of clothing

17.1 Does your clothing make it easy for the public to recognise your profession?

If Yes, please provide details of your purchases of **Occupation Specific clothing**.

17.2 Does your clothing protect you from potential injury (e.g. safety boots, gloves)?

If Yes, please provide details of your purchases of **Protective Clothing**.

17.3 Do you wear a work uniform?

17.3.1 If Yes, is the policy that wearing the uniform is compulsory while at work?

17.4 Is your work uniform distinctive to your organisation?

- 17.5 Are shoes, socks and/or stockings an essential part of this uniform?    
 If Yes to 17.5, please provide details of your purchases.
- 17.6 Do you wear a non-compulsory work uniform?
- 17.6.1 If Yes, has your employer registered the design?    
 Note: Shoes, stockings and socks cannot be claimed for a non-compulsory work uniform.
- 17.7 Laundry Expenses  
 If you answered Yes to any of the questions in section 17.0 above, you may be able to claim the cost of laundering your clothes (e.g. washing, drying and ironing work clothes).    
 Note: The reasonable basis to determine laundry expenses is \$1 per load of washing including drying & ironing. If your total laundering expense claim exceeds \$150 *and* the claim for your other work expenses exceeds \$300 then you will need to provide written evidence (receipts) of your claim.
- 17.8 Does the nature of your employment require you to work in an environment that exposes you to sun and ultra violet radiation? (Sun Protection Products)    
 If Yes, you may be able to claim the costs of sunscreen lotions, hats and sunglasses. Please provide details of expenses incurred. If you have not kept receipts you can make a reasonable estimate of up to \$85.00.

18.0	Other Work Related Expenses	Yes	No
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- |       |  |                          |                          |
|-------|--|--------------------------|--------------------------|
| 18.1  | Union Fees – If not already detailed on your PAYG Payment Summary  | <input type="checkbox"/> | <input type="checkbox"/> |
| 18.2  | Purchasing, insuring and repairing equipment used for work related purposes. Depreciation may be claimed on purchased equipment.   | <input type="checkbox"/> | <input type="checkbox"/> |
| 18.3  | Overtime Meals – Only if you received an overtime meal allowance   | <input type="checkbox"/> | <input type="checkbox"/> |
| 18.4  | Sickness and Accident/Income Protection Insurance premiums   | <input type="checkbox"/> | <input type="checkbox"/> |
| 18.5  | Telephone expenses – Work related telephone calls  | <input type="checkbox"/> | <input type="checkbox"/> |
| 18.6  | Computers and computer software  | <input type="checkbox"/> | <input type="checkbox"/> |
| 18.7  | Books, journals and professional libraries   | <input type="checkbox"/> | <input type="checkbox"/> |
| 18.9  | Seminars, conferences and other training   | <input type="checkbox"/> | <input type="checkbox"/> |
| 18.10 | Home office expenses – Heating, cooling, lighting, leasing, repairs, depreciation, percentage of use for income producing activities.<br>Note that a diary of usage should be kept for a minimum of 4 weeks each year for substantiation requirements. | <input type="checkbox"/> | <input type="checkbox"/> |
| 18.11 | Subscriptions  | <input type="checkbox"/> | <input type="checkbox"/> |
| 18.12 | Formal education provided by professional organisation   | <input type="checkbox"/> | <input type="checkbox"/> |

19.0	Film Industry/ Trees or Agribusiness or Tax Effective Investments	Yes	No
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- |      |  |                          |                          |
|------|--|--------------------------|--------------------------|
| 19.1 | Have you invested any money in these types of Investments?<br>If Yes, please provide details of this investment. | <input type="checkbox"/> | <input type="checkbox"/> |
|------|--|--------------------------|--------------------------|

<b>20.0 Personal Superannuation Contributions</b>		<b>Yes</b>	<b>No</b>
20.1	Have you made personal super contributions to a complying superannuation fund? If Yes, please answer the following:	<input type="checkbox"/>	<input type="checkbox"/>
20.1.1	Were you fully self-employed during the financial year?	<input type="checkbox"/>	<input type="checkbox"/>
20.1.2	Were you partly self-employed?	<input type="checkbox"/>	<input type="checkbox"/>
20.1.3	Were you partly self-employed and worked for an employer who provided no super cover?	<input type="checkbox"/>	<input type="checkbox"/>
20.1.4	The total of personal super contributions made for the year	<input type="checkbox"/>	<input type="checkbox"/>
20.1.5	The full name of the funds contributed to and their respective policy numbers	<input type="checkbox"/>	<input type="checkbox"/>
20.1.6	Copy of the s82AAT notice from your superannuation fund acknowledging your intention to claim a tax deduction	<input type="checkbox"/>	<input type="checkbox"/>
<b>21.0 Dividend and Interest Deductions</b>		<b>Yes</b>	<b>No</b>
21.1	Have you received any dividends or interest? Expenses incurred can be claimed against that income. The following expenses would include but are not limited to the following:	<input type="checkbox"/>	<input type="checkbox"/>
21.1.1	Financial Institutions Duty (FID)	<input type="checkbox"/>	<input type="checkbox"/>
21.1.2	Account keeping fees	<input type="checkbox"/>	<input type="checkbox"/>
21.1.3	Management fees	<input type="checkbox"/>	<input type="checkbox"/>
21.1.4	Interest charged on money borrowed to purchase the shares or units	<input type="checkbox"/>	<input type="checkbox"/>
<b>22.0 Donations or Gifts</b>		<b>Yes</b>	<b>No</b>
22.1	Have you made any gifts or donations? If Yes, please provide details of types, dollar amounts and recipients.  Note: You cannot claim a deduction for a donation if you receive something (e.g. pins, flowers, attendance to a function) or have the potential to receive something (e.g. winning a prize) in return for your gift or donation.	<input type="checkbox"/>	<input type="checkbox"/>
<b>23.0 Managing your Tax Affairs</b>		<b>Yes</b>	<b>No</b>
23.1	Expenses relating to preparing and lodging your tax return	<input type="checkbox"/>	<input type="checkbox"/>
23.2	Advice from a registered tax agent	<input type="checkbox"/>	<input type="checkbox"/>
23.3	Costs of travel in obtaining tax advice including K/M Travelled to attend.	<input type="checkbox"/>	<input type="checkbox"/>
23.4	Interest paid to the Australian Taxation Office for late payment of income tax	<input type="checkbox"/>	<input type="checkbox"/>
23.5	Advice relating to managing your legal obligation relating to another person's tax affairs	<input type="checkbox"/>	<input type="checkbox"/>

<b>24.0 Rebates/Offsets</b>		<b>Yes</b>	<b>No</b>
	Your answers to the following questions will help us determine if you are eligible for any rebates/offsets.		
24.1	Are you eligible for Senior Tax Offset?	<input type="checkbox"/>	<input type="checkbox"/>
24.2	Have you received any Family Tax Benefit during the financial year?	<input type="checkbox"/>	<input type="checkbox"/>
24.3	Please provide details of the amount and type of the Centrelink payments received during the financial year. (Payments received from Centrelink affect the rebates you can claim in your tax return.)	<input type="checkbox"/>	<input type="checkbox"/>
<b>25.0 Spouse</b>		<b>Yes</b>	<b>No</b>
25.1	Do you have a spouse (married or de facto)?	<input type="checkbox"/>	<input type="checkbox"/>
25.2	Has your spouse received the Basic Parenting allowance or additional parenting allowance?	<input type="checkbox"/>	<input type="checkbox"/>
25.3	If Yes, please enclose the Centrelink group certificate received by your spouse.	<input type="checkbox"/>	<input type="checkbox"/>
<b>26.0 Child Housekeeper</b>		<b>Yes</b>	<b>No</b>
26.1	Has your child, adopted child or step-child kept house for you on a full-time basis? (You cannot claim a rebate here for any period you lived with a spouse.)	<input type="checkbox"/>	<input type="checkbox"/>
<b>27.0 Zone</b>		<b>Yes</b>	<b>No</b>
27.1	Have you lived in a remote or isolated area of Australia (e.g. North QLD)?	<input type="checkbox"/>	<input type="checkbox"/>
<b>28.0 Superannuation Contributions on Behalf of your Spouse</b>		<b>Yes</b>	<b>No</b>
28.1	Have you contributed any superannuation on behalf of your spouse?	<input type="checkbox"/>	<input type="checkbox"/>
<b>29.0 Net Medical Expenses</b>		<b>Yes</b>	<b>No</b>
	Medical expenses paid by you for yourself, your spouse, child under 21, child housekeeper or invalid relative, dependant student under 25, can be claimed by you as a rebate. Medical Expenses include:		
29.1	Medical expenses paid whilst travelling overseas	<input type="checkbox"/>	<input type="checkbox"/>
29.2	Expenses paid to legally qualified doctor, chemists, public or private hospitals	<input type="checkbox"/>	<input type="checkbox"/>
29.3	Dentists, orthodontists, opticians and optometrists	<input type="checkbox"/>	<input type="checkbox"/>
29.4	Medical aids prescribed	<input type="checkbox"/>	<input type="checkbox"/>
29.5	Do not claim contributions to a private health fund	<input type="checkbox"/>	<input type="checkbox"/>
29.6	Do not claim travel or accommodation expenses in relation to medical treatment	<input type="checkbox"/>	<input type="checkbox"/>
29.7	Deduct from medical expenses refunds received from Medicare and health funds	<input type="checkbox"/>	<input type="checkbox"/>
29.8	If the medical expenses above less all Medicare and private health fund refunds is greater than \$2,000 please advise so that a medical expenses rebate of 20 cents for every \$1 over \$2,000 can be claimed. If this is the case, confirm you have provided us with a Tax Statement from your private health fund and Medicare showing net expenses paid.	<input type="checkbox"/>	<input type="checkbox"/>

<b>30.0</b>	<b>Medicare Levy Exemption</b>	<b>Yes</b>	<b>No</b>
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30.1 Are you exempt from paying the Medicare Levy?  Yes  No

<b>31.0</b>	<b>Private Health Insurance</b>	<b>Yes</b>	<b>No</b>
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31.1 Were you a member of a private health fund?  
If Yes, please provide the name of the fund, type of cover, membership number and provide a copy of the Rebate Entitlement Notice provided by the health fund.  Yes  No

<b>32.0</b>	<b>Baby Bonus Eligibility</b>	<b>Yes</b>	<b>No</b>
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To be eligible for the baby bonus, you need to be able to answer Yes to all conditions below.

32.1 You had a baby or became legally responsible for a child (e.g. through adoption) after 30 June 2001  Yes  No

32.2 You were an Australian resident at the time  Yes  No

32.3 You did not have legal responsibility for the child before 1 July 2001  Yes  No

32.4 If you adopted the child, on the day you gained legal responsibility of the child **no other person** had legal responsibility  Yes  No

32.5 If the child is adopted:

32.5.1 Was the child under 5 during the claim year end, at that time:  Yes  No

32.5.2 You had legal responsibility for and care of the eligible child, and  Yes  No

32.5.3 You were an Australian resident  Yes  No

32.6 Do you or your spouse have children from another relationship who were born after 30 June 2001?  Yes  No

32.7 If Yes, does your spouse have legal responsibility for and care of your child, and are they also eligible to claim the baby bonus for another child?  Yes  No

<b>33.0</b>	<b>Family Tax Benefit</b>
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To assist us with making a full claim for family tax benefit, please provide the following information for each dependent child:

Name	Date of Birth	Taxable Income	Full Time Student?	
			Yes	No
1.		\$	<input type="checkbox"/>	<input type="checkbox"/>
2.		\$	<input type="checkbox"/>	<input type="checkbox"/>
3.		\$	<input type="checkbox"/>	<input type="checkbox"/>
4.		\$	<input type="checkbox"/>	<input type="checkbox"/>
5.		\$	<input type="checkbox"/>	<input type="checkbox"/>
6.		\$	<input type="checkbox"/>	<input type="checkbox"/>
7.		\$	<input type="checkbox"/>	<input type="checkbox"/>

		Yes	No
33.1	Did you have full-time care of all of your dependants for the full year?	<input type="checkbox"/>	<input type="checkbox"/>
33.2	Have you elected to receive Family Tax Benefits through your income tax return?	<input type="checkbox"/>	<input type="checkbox"/>
33.3	Have you provided details of your spouse's taxable income if we do not prepare his/her tax return?	<input type="checkbox"/>	<input type="checkbox"/>

<b>34.0</b>	<b>New 30% Child Care</b>	<b>Yes</b>	<b>No</b>
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34.1	Have you received your End of Year Child Care Payment Summary from your Child Care Centre? Please provide a copy of statement.	<input type="checkbox"/>	<input type="checkbox"/>
34.2	Have you received any information from Family Assistance Office about Child Care Benefit for 2004/2005 financial year? Please provide copies of all information received.	<input type="checkbox"/>	<input type="checkbox"/>

<b>35.0</b>	<b>Higher Education Contribution Scheme and other</b>	<b>Yes</b>	<b>No</b>
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35.1	Do you have a HECS debt? If Yes, please provide a copy of your HECS statement.	<input type="checkbox"/>	<input type="checkbox"/>
35.2	Have you stopped full time education during this financial year?	<input type="checkbox"/>	<input type="checkbox"/>
35.3	Have you become or ceased to be a resident of Australia during this financial year?	<input type="checkbox"/>	<input type="checkbox"/>
35.3.1	If Yes, what date did you become or cease to be a resident of Australia?		

<b>36.0</b>	<b>The Top Forgotten Deductions – Consider:</b>	<b>Yes</b>	<b>No</b>
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36.1	Depreciation of income producing buildings	<input type="checkbox"/>	<input type="checkbox"/>
36.2	Depreciation of fittings for rental properties	<input type="checkbox"/>	<input type="checkbox"/>
36.3	Income protection insurance	<input type="checkbox"/>	<input type="checkbox"/>
36.4	Business diary	<input type="checkbox"/>	<input type="checkbox"/>
36.5	Parking fees and tolls attending Training and Seminars	<input type="checkbox"/>	<input type="checkbox"/>
36.6	Batteries for calculators or electronic organisers.	<input type="checkbox"/>	<input type="checkbox"/>
36.7	Borrowing costs for negative gearing	<input type="checkbox"/>	<input type="checkbox"/>
36.8	Travel between work and study place	<input type="checkbox"/>	<input type="checkbox"/>
36.9	Travel to investment seminars for investors	<input type="checkbox"/>	<input type="checkbox"/>
36.10	Please note below any items that may require further information or explanation. We also value your feedback. Please provide comments below.		

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