



2010/11 TAX RETURN CHECKLIST

Personal Details *please answer ALL questions in this section*

Name: _____ Email: _____

Address: _____ Post Code: _____ State: _____

Phone: _____ DOB: ____ / ____ / ____

Occupation: _____ TFN: _____

Family Details *partners details not required if we're the agent*

Do you receive Family Tax Benefit: Y N Want to claim the Education Tax Offset: Y N

Name/Age/Grade of Children: _____

Marital Status: _____ Partner's Name: _____

Partner's Taxable Income: _____ Partner's DOB: ____ / ____ / ____

Additional Information *please tick if you would like more information on the following*

- | | |
|---|---|
| <input type="checkbox"/> Life Insurance | <input type="checkbox"/> Superannuation |
| <input type="checkbox"/> Income Protection | <input type="checkbox"/> Investment Property Advice & Mortgages |
| <input type="checkbox"/> Shares & Managed Funds | <input type="checkbox"/> Business Advice |

Payment Options *please tick one*

- Fee from refund +\$11 (refund by cheque only)
 Invoice (refund by cheque or direct deposit)

Direct deposit details Account Name: _____

BSB Number: _____ Account Number: _____

Other Details *please include any of the following applicable information*

- | | |
|--------------------------------------|---|
| - Employment PAYG Group Certificates | - Business income & expenditure |
| - Centrelink PAYG Group Certificates | - Rental property income & expenditure |
| - Private Health & Medicare | - Capital Gains |
| - HECS/HELP debt | - Work related car and/or travel expenses |
| - Interest/Dividends earned | - Home office expenses related to work |
| - Receipts for Education Tax Refund | - Gifts and Donations |
| - Work related Self Education | - Income from any other entities |
| - Work related phone expenses | - Work related subscriptions & union fees |
| - Tools & Equipment | - Termination payments |
| - Do you wear a uniform with logo | - Cost of last years tax return |

Any unique information we should know: _____

What do you want done with your records: Kept at Seachange Returned