

Client name

Address

.....

Telephone no Fax no.....

Mobile no Email address.....

Change in marital status? Date of birth.....

What is your occupation?

Dependants? YES/NO

If yes, how many dependants?

Full Names

Date of birth

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Income

Salary or wagesAttached

Allowances, earnings, tips, director's fees etcAttached

Australian Government allowances, pensions and paymentsAttached

Australian annuities and superannuation income streams & lump sum payments.....Attached

Details of interest received:

Bank	Account number	Amount	Joint names?

Details of dividends received (or reinvested on your behalf)

Company	Date Paid	Unfranked Dividend's	Franked Dividends	Franking Credits	TFN Amount

Distributions from partnerships, trusts or managed fundsAttached

Capital gains (Please attach original purchase and sale documentation)Attached

Foreign source income (including foreign pensions) and foreign assets or propertyAttached

Rental property income & expenditure summary.....
Attached

Other income (please specify).....Attached

Deductions

Please provide details regarding your work related car, work related travel, work related uniform, work related education expenses, as well as interest deductions, dividend deductions, personal superannuation contributions and gifts and donations, and any other work related expenses in the following schedule.

Date Incurred	Description	Amount

Additional Information

Private health statement..... Attached

Education tax refund details..... Attached

Medical Expenses for the period..... Attached

FMD Deposit/Withdrawal details.....Attached

Details of any investments made during the year..... Attached

Spouse name, D.O.B & separate net income.....

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Please provide any other information that you feel will be integral to the preparation of your 2010/11 tax return.

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Please sign and date once all information has been checked and collated

X

Date: / / 2011