



# SJS Accounting Strategies Quality System

**Title:**

**Income Tax Information**

**Doc ID:**

**REC 02-02-01**

Given Name		Surname	
TFN			
Mobile			
Home Phone			
Email			
Occupation			
Bank Account for Tax Return Purposes			
BSB	Account Number	Account Name	

## INCOME

PAYG Summaries (Please Attach Copy)

### Employment Income

Employer	Gross	Tax	Salary Sacrifice Allowances

### Bank Interest

Bank	Account Number	Amount	Shared

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Prepared By: Trent Smith	Job Title: QA Consultant	Signature:	Date: / /
Approved By: Susan Smith	Job Title: Director	Signature:	Date: / /
Review Period: 24 Months	Effective Date:		Copy No:

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**Dividends**

Company	Unfranked	Franked	Imputation Credit

**Trust Distributions**

Please Attach Paperwork

**Capital Gains**

If shares sold during this Financial Year

- Date of Sale
- Number of Shares Sold
- Consideration Received
- Date of Original Purchase
- Number of Shares Purchased
- Amount paid including Brokerage

If property sold during this Financial Year

- Date of Sale
- Address of Property
- Consideration Received
- Agents Commission
- Marketing Costs
- Legal/Conveyancing Costs
- Date of original Purchase
- Cost of Property
- Legal/Conveyancing Costs
- Stamp Duty on Purchase
- Renovations throughout ownership
- Any other relevant documentation in relation to the property

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**DEDUCTIONS**

**Motor Vehicle**

- Logbook to be provided
- Set Kilometres any from 1 to 500 for business use
- If Logbook provided
  - Registration
  - Petrol
  - Insurance
  - Servicing/Repairs
  - Cost of Vehicle and Purchase Price (need documentation)
  - Interest Schedule from Financing Company
  - Leasing Costs
  - Tolls
  - Parking
  - Car Washes
  - Please advise if there is a safe lockable tool storage facility at your work place

If you want to claim up to 5000 kilometres then list business trips and the total kilometres will be calculated at 66 cents per km.

**Work Related Travel Expenses**

- Accommodation
- Meals
- Parking
- Tolls
- Need Clarification between domestic and overseas travel
- For overseas travel need a travel diary if away for more than 6 consecutive days
- Please note that you need to substantiate all travel expenses

**Work Related Clothing**

- Dry Cleaning/Laundry
- Safety Glasses, Sun Hats, Sunscreen for outside workers
- Occupational Specific Clothing
- Protective Clothing and Boots
- Gloves, Marks, and High Visibility Clothing

**Self-Education Expenses (if related to Current Employment)**

- Course Name
- Place of Study i.e. University or TAFE
- Course Fees (Not HECS)
- Stationery, Printing
- Reference Books
- Travel
- Computer Costs

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### Other Deductions

- Union Fees
- Professional Associations/Memberships
- Subscriptions
- Seminar/Professional Development
- Computer Equipment/Software (Date of Purchase and Cost)
- Printing/Stationery/Diary
- Home Office Hours (worked at home each week)
- Internet (having kept a diary of hours worked at home)
- Office Furniture
- Materials
- Tools over \$300 listed separately with date of purchase
- Tools under \$300
- Repairs and maintenance to computer, office furniture
- Mobile Phone log book of business usage
- Industry Magazines/Journals/Newspapers
- Income Protection Insurance and Accident and Disability
- Insurance Premiums
- Donations anything over \$2 to a registered charity
- Tax Agent Fee
- Travel to Tax Agent
- Superannuation Contribution
  - Superannuation Fund Name
  - Superannuation Fund ABN
  - Member Number
  - Amount Contributed

### Private Health Insurance

- Company Held with (Please Provide Statement)
- Policy Number
- Number of Dependant Children
- Is Spouse and Children Covered by this Private Health Policy
- Please Provide Details of Spouse
  - Name
  - Date of Birth
  - Taxable Income

If Client has Rental Property Please complete REC 02-03-01 Investment Property Income & Expenses

### Document Revision History

Revision	Section(s) revised and brief description
01	Original

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