



Tax Return Information Form

2018 Individual Tax Return

Please e-mail, fax or post this form back to our office **PRIOR** to your appointment:

TO: Specialised Business Solutions

FAX: (07) 3221 4130

ATTENTION:

E-MAIL: sbs@sbs.net.au

CLIENT NAME:		CLIENT SIGNATURE:	
INFORMATION FOR 2018 TAX RETURN (1 July 2017 to 30 June 2018)			
Name:		Spouse Name:	
DOB:		Spouse DOB:	
Residential Address:		Postal Address:	
TFN:		Email:	
Phone:		Mobile:	
BANK DETAILS (as of 1 July 2017, if you are expecting a refund, you MUST provide the ATO your EFT Bank Details)			
Account Name:		Bank Name:	
BSB:		Account No.:	
DEPENDANTS (as at 30 June 2018)			
Name:		Name:	
DOB:		DOB:	
Name:		Name:	
DOB:		DOB:	
PAYG PAYMENT SUMMARIES (Please Attach, Fax or Email All Slips)			
Employer:	Occupation:	Gross:	Tax:
		\$	\$
		\$	\$
BANK INTEREST			
Bank:	Amount:	TFN Credits:	Bank Charges:
	\$		
	\$		
WORK & OTHER EXPENSES (Please Attach, Fax or Email Detailed Listing)			
Motor Vehicle Type:		Reference Books:	\$
Engine Size (litres):		Stationery:	\$
Work Kilometres:		Mobile Phone:	\$
Taxi Fares:	\$	Internet:	\$
Other Travel:	\$	Memberships:	\$
Uniform/Laundry:	\$	Tools & Equipment:	\$
Personal Super Contributions:	\$	Interest Expenses:	\$
Sun Protection Items:	\$	Gifts & Donations:	\$
Self-Education:	\$	Income Protection Insurance:	\$
Union Fees:	\$	Other Expenses:	Please Attach Details
Seminars/Prof Development:	\$		
PRIVATE HEALTH INSURANCE (please provide a copy of your Annual Tax Statement)			
Fund Name:		Type of Cover:	
Membership No:		Days Covered:	Excess:
Rebate Claimed?	<input type="checkbox"/> Yes <input type="checkbox"/> No		
If Yes What %	<input type="checkbox"/> 10% <input type="checkbox"/> 15% <input type="checkbox"/> 20% <input type="checkbox"/> 25% <input type="checkbox"/> 30% <input type="checkbox"/> 35% <input type="checkbox"/> 40%		
DO YOU HAVE ANY OF THESE ITEMS? (If so, then please download additional forms from www.sbs.net.au)		<input type="checkbox"/> Investment Income	<input type="checkbox"/> Rental Properties
		<input type="checkbox"/> Investments Sold	<input type="checkbox"/> Motor Vehicles used for Work