

Please note that most individual 2023-24 tax returns are due for lodgment by 15 May 2025 (unless you have been informed otherwise).

During peak tax periods our turnaround is 8-10 weeks from when we receive your documentation.

If your return is required urgently (Express fees may apply), please indicate which period that would be suitable for you:

☐ 6-8 weeks ☐ 8-10 weeks ☐ 10-15 weeks ☐ Preference (Subject for approval): _____

GIVEN NAME: _____ MIDDLE NAME: _____

SURNAME: _____ OCCUPATION: _____

ADDRESS: _____

HOME PHONE: _____ MOBILE PHONE: _____

BANK ACCOUNT NAME: _____

BANK BSB NUMBER*: _____ BANK ACC* NUMBER: _____

EMAIL ADDRESS _____

NAMES OF DEPENDENT CHILDREN NAME OF SPOUSE OR PARTNER (Includes same sex couples)*

INCOME

ARE YOU AN EMPLOYEE? ☐ YES ☐ NO
(Including pensions)

If yes, your PAYG income summaries from your employers will be available via the ATO portal or MY GOV

OTHER INCOME (Includes any business income, director's fee, commissions etc)

INTEREST RECEIVED

NAME OF BANK	ACCOUNT NUMBER	TOTAL INTEREST RECEIVED \$	TFN WITHHOLDING \$	JOINT ACCOUNT?

DIVIDENDS

Please provide copies of dividend statements of Income received, including Dividend Reinvestment Plans (DRP)

NAME OF SHARES	NUMBER OF SHARES HELD	AMOUNT RECEIVED \$

TRUST AND PARTNERSHIPS

(Eg: BT funds, Merrill Lynch, AXA etc) Name of trust or partnership -

Please provide **Annual Tax Statements**

CAPITAL GAIN

Did you sell any assets such as shares or property which were acquired after 20 September 1985?

Applicable ☐ YES ☐ NO

If yes, please provide documentation of when it was purchased/cost and also documents on sale/funds received, etc.

RENTAL INCOME (including AIRBNB)

Please complete attached rental property statement checklist.

EMPLOYEE SHARE/OPTION SCHEME

Did you receive bonus shares/options from your current employer during 2023/2024?

☐ YES ☐ NO

If yes, please provide the related correspondences/documents received from the employer.

ANY OTHER INCOME

(Any Income you have received in the financial year that does not fit into any of the above categories. Please provide details.) ***Eg. Interest on any overseas bank accounts or any other foreign income received.***

Do you have any assets over \$50,000AUD outside of Australia? ☐ YES ☐ NO

DEDUCTIONS

Please ensure you are able to substantiate all claims, even if less than \$300.

MOTOR VEHICLE

Did you use your own car for business/work purposes through the year? ☐ YES ☐ NO

If yes, then please provide one of the following:

Log Book Method- Business % use (Please ensure you keep a log book for a continuous period of 12 weeks)

Please choose from the drop down list for all expenses you incurred over the financial year and provide amounts next to each of them.

If first year of claiming the car – car value as at the beginning of the financial year \$

EXPENSES	AMOUNT \$

OR

Kilometres Method

You haven't kept a log book but use your car for work. Let us know how many kilometres you would have travelled for work. The maximum the tax office allows you to claim is 5000 Kilometres.

Car Registration Number: _____

Kilometres: _____

WORK-RELATED TRAVEL EXPENSE

Do you have travelling expenses not reimbursed / paid for by your employer? ☐ YES ☐ NO

EXPENSES	AMOUNT \$

WORK UNIFORM

Do you wear: ☐ YES ☐ NO

- Protective clothing
- Uniform with a company logo
- Occupation specific clothing

If yes, were you out of pocket through the year for purchasing any new items. (If so please provide details) Laundering and dry cleaning of clothing listed above are claimable.

SELF EDUCATION

Name of Course: _____ Institution: _____

How does it relate to your current employment/employer? _____

Fees (Excluding HECS/HELP debt): _____

Travel: _____

HOME OFFICE

Fixed Rate Method _____ Hours per week _____ How many weeks _____
Actual Cost Method _____ Floor area percentage of the home office working area out of the total internal floor area _____

Please choose from the drop down list for all expenses you incurred over the financial year and advise amounts spent.

EXPENSE	AMOUNT \$

OTHER WORK RELATION DEDUCTIONS

Please choose from the drop down list for all unreimbursed work expenses you incurred over the financial year and advise amounts spent

EXPENSE	NAME	AMOUNT \$

INTEREST AND DIVIDEND DEDUCTIONS

(i.e. interest on share investments margin loan)

OTHER

(Costs you incurred that was directly related to your job)

Please provide details:

Income Protection Insurance ☐ YES ☐ NO If yes, how much did you pay \$ _____

GIFTS OR DONATIONS

Voluntary gifts of \$2 or more made to a Deductible Gift Recipient (DGR) Status Organization, please list the name of the organization and the amount donated. (This includes School Building Fund donations)

TAX OFFSETS

PRIVATE HEALTH INSURANCE

Do you have private health Insurance? ☐ YES ☐ NO

Please confirm all your family members (including your spouse and children) were covered by private health insurance hospital cover ☐ YES ☐ NO

SPOUSE OR PARTNERS TAXABLE INCOME *COMPULSORY: Please supply spouse taxable income, include Reportable Fringe Benefits, Reportable Superannuation if the spouse is not a Chan and Naylor Client.

(Includes same sex couples)

Did you have a spouse/partner for the full financial year? ☐ YES ☐ NO

Does your spouse/partner receive any benefits from Centrelink? ☐ YES ☐ NO

What was your spouse or partner's taxable income: \$ _____
reportable fringe benefits \$ _____, reportable superannuation \$ _____

SUPERANNUATION

a) Are you self-employed? If yes, please provide details of contributions you made to your superannuation for the financial year.

b) Have you made superannuation contributions on behalf of your spouse?

OTHER

Any other information that we should be aware of: i.e. you are not entitled to Medicare Benefit, you are a student etc.

Please ensure that the information you have supplied is correct. The onus is on you the taxpayer to be able to / substantiate the information that you have supplied.

SIGNED: _____ **DATE:** _____

Only rents received and expenses **paid** between 1 July 2023 and 30 June 2024

Owner Names & Ownership %: Address of Rental Property:	
Number of weeks property was rented this year:	

INCOME

Gross rental income	
Other rental related income Gross Rent	

EXPENSES

D Advertising for tenants	
E Body corporate fees (Strata Levies)	
F Borrowing expenses	
G Cleaning	
H Council Rates	
I Capital allowances (depreciation)	
J Gardening/lawn mowing	
K Insurance	
L Interest on loans	
M Land Tax	
N Legal fees	
O Pest control	
P Property agent fees/commission	
Q Repairs and maintenance (R & M)	
(for R & M purchases greater than \$300 need details) R Capital Work's Deduction (Building)	
S Stationery, telephone and postage	
T Travel expenses (Not allowed after 30/6/2017)	
U Water charges	
V Sundry rental expenses	
TOTAL EXPENSES	

NET RENT

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For property purchased this financial year please provide the following:

Settlement Sheet
Bank Loan Offer
First Bank Statement
Transfer Title Documents
First Page Of The Contract For Sale Depreciation Schedule (if any)

