



IF YOU KEEP YOUR TEMPLATE INFORMATION FOR EACH FOLLOWING YEAR YOU WILL ONLY NEED TO CHANGE THE \$ AMOUNT IN MANY CASES. COMPLETE THE DETAILS BELOW AND EMAIL / FAX / POST THEM INTO US.

Taxation Year Ended (dd/mm/yyyy)

Are you an APS Benefits Member?

Yes

No

Preferred Method of Contact (Email/Phone/Post)

Email

Phone

Post

Preferred Contact Days (eg Mon - Fri)

Preferred Contact Times (eg 9am - 7pm)

YOUR DETAILS

Tax File Number

Full Name

Date of Birth (dd/mm/yyyy)

Home address

Email address

Preferred Phone Number

Occupation or position title
or 'retired'

SPOUSE / PARTNER DETAILS

Tax File Number

Full Name

Date of Birth (dd/mm/yyyy)

Home address

Email address

Preferred Phone Number

Occupation or position title
or 'retired'

Spouse/Partner taxable income

Number of Dependant Children (and ages)

THE TAX OFFICE NO LONGER ISSUE REFUND CHEQUES. PLEASE PROVIDE US WITH THE FOLLOWING DETAILS TO RECEIVE YOUR TAX REFUND.

Account Name (needs to be precise e.g. Ronald A Smith)

BSB (6 digits, no space or dash)

Account Number (up to 9 digits)

PLEASE ATTACH THE FOLLOWING DOCUMENTS THAT APPLY TO YOUR CIRCUMSTANCES:

INCOME

Complete if known

	Yes	No	\$
1. PAYG payment summary(s).	Yes	No	\$
2. Allowances, benefits, earnings, tips and directors fees.	Yes	No	\$
3. Lump sum and termination payments. All documentation should be provided including Statement of Termination Payment from employer or fund/ADF.	Yes	No	\$
4. Annuity or Superannuation Pension.	Yes	No	\$
5. Primary producers, artists, composers, inventors, performers, production associates, sports persons and writers should detail separately income earned from such activities.	Yes	No	\$
6. Government Centrelink payments including pensions, unemployment, parenting allowance and sickness benefits.	Yes	No	\$
7. Details of any assets SOLD such as shares or real estate including date of purchase, purchase price, date of sale and sale price.	Yes	No	\$
8. Income from Trusts or Partnerships.	Yes	No	\$
9. Rental income including date of purchase, purchase price, date first rented and number of weeks rented this financial year.	Yes	No	\$
10. Interest received.	Yes	No	\$
11. Dividend payment slips for dividend income received.	Yes	No	\$
12. Foreign source (employment and pension) income and details of any foreign tax credit attached to that income.	Yes	No	\$

EXPENSES

1. Rental property expenses including interest paid on mortgage and any borrowing costs incurred.	Yes	No	\$
2. Union fees and subscriptions.	Yes	No	\$
3. Protective clothing and footwear.	Yes	No	\$
4. Uniform costs and dry cleaning.	Yes	No	\$
5. Home office. How many hours a week do you work from home?	Yes	No	\$
6. Telephone expenditure related to work.	Yes	No	\$
7. Internet costs related to work.	Yes	No	\$
8. Other expenditure related to your employment (remember substantiation requirements).	Yes	No	\$
9. Assets purchased for work purposes. Amount and date of purchase	Yes	No	\$
10. Conferences and seminars.	Yes	No	\$
11. Self-education costs.	Yes	No	\$
12. Glasses, sunhats and sunscreen where you are required to work outdoors.	Yes	No	\$
13. Income protection Insurance.	Yes	No	\$
14. Donations over \$2.	Yes	No	\$
15. Annuities - undeducted purchase price.	Yes	No	\$
16. Non-employer sponsored superannuation contributions (self-employed persons only).	Yes	No	\$
17. Tax agent fees and other accounting and tax audit fees.	Yes	No	\$
18. Motor vehicle expenses - kms travelled or actual expenses if log book kept.	Yes	No	\$
19. Bank charges that relate to income earned.	Yes	No	\$

REBATES

1. Net medical expenses relating to disability aids, attendant or aged care if they exceed \$2,128 or \$5,233 depending on your income. *Conditions apply.	Yes	No	\$
2. Super contributions for your spouse / partner.	Yes	No	\$
3. Private health insurance statement.	Yes	No	\$
4. Do you live in a remote or isolated area of Australia? If so you may be entitled to a Zone Rebate.	Yes	No	\$
5. Super co-contribution if you earn less than \$46,920.	Yes	No	\$

OTHER

1. Please advise us of any HECS/HELP balances.	
2. Any other miscellaneous information that you think is relevant.	

IF YOU HAVE ANY QUERIES, PLEASE CONTACT US ON 1300 131 809, OR INCLUDE THEM IN YOUR EMAIL AND WE WILL ANSWER THEM WHEN WE ARE PREPARING YOUR RETURN.

IMPORTANT

This service is available to non members, so please help us to spread the word and tell your family, friends and colleagues about us too.

If they don't need a tax agent maybe they need a financial advisor, legal advisor or a mortgage broker. They are all in-house and at not-for-profit prices.

Don't forget any profits we do make add to the funeral benefit bonus pool.