



## Individual Return Questionnaire (IRQ)

<b>GENERAL INFORMATION</b>			
Title			
Full Name:			
Tax File No:			
ABN:		Mobile:	
Home Address:			
Suburb		Post Code:	
Email address:			
Date of Birth:			
Australian Resident:			
Occupation:			

<b>BANKING DETAILS</b>			
Please complete your bank account details below so the ATO can electronically deposit your tax refund.			
Account Name:			
BSB:		Account No:	

## INCOME

Please answer the below questions Yes or No.  
Please ensure you have available all the appropriate documentation to substantiate your income as these may be called upon when finalising your return.

YES      NO

Did you receive a <b>PAYG Summary</b> Statement from your <b>employer</b> ?	<input type="checkbox"/>	<input type="checkbox"/>
Did you receive a <b>Payment Summary</b> from <b>Centrelink</b> or another <b>Government body</b> ?	<input type="checkbox"/>	<input type="checkbox"/>
Did you <b>earn Interest</b> income during the year?	<input type="checkbox"/>	<input type="checkbox"/>
Did you <b>receive</b> any <b>dividends</b> during the year?	<input type="checkbox"/>	<input type="checkbox"/>
Did you receive any <b>income</b> from a <b>managed funds</b> or <b>cash management trust</b> ?	<input type="checkbox"/>	<input type="checkbox"/>
Did you <b>sell any shares</b> during the year?	<input type="checkbox"/>	<input type="checkbox"/>
Do you have any <b>investment property</b> ?	<input type="checkbox"/>	<input type="checkbox"/>
Do you have any <b>business income</b> ?	<input type="checkbox"/>	<input type="checkbox"/>
Did you receive any <b>Foreign Source Income</b> ?	<input type="checkbox"/>	<input type="checkbox"/>
Have you received any <b>other assessable income</b> during the period?	<input type="checkbox"/>	<input type="checkbox"/>

## DEDUCTIONS

Please answer the below questions Yes or No.  
Please ensure you have available all the appropriate documentation to substantiate your expenses as these may be called upon when finalising your return.

	YES	NO
Did you <b>incur</b> any <b>work related expenses</b> during the year i.e stationery, seminars, mobile phone, interest, tools & equipment, subscriptions?		
Did you use your <b>motor vehicle</b> for income producing purposes?		
Did you maintain a <b>Log Book for your motor vehicle</b> ?		
Did you have any other <b>work related travel</b> ?		
Did you wear <b>compulsory</b> occupational distinctive <b>uniform or protective clothing</b> ?		
Did you incur any <b>self-education</b> expenses directly relating to your income producing activity?		
Did you purchase a <b>computer or laptop</b> , which you used income producing purposes?		
Did you <b>work from home</b> and have you maintained a log of your hours?		
Have you taken out an <b>investment loan</b> to purchase shares or invest in managed funds?		
Do you have <b>income protection insurance</b> ?		
Have you made any <b>gifts, charity purchases or donations</b> of \$2 or more to an eligible organisation?		
Did you incur <b>Tax Agent fees</b> last year?		
Have you made <b>personal superannuation contributions</b> in addition to your Employer statutory contributions?		