

Tax Return Information Checklist

Please complete this form and return it together with your supporting documents.

1. Personal Details

Full Name: _____

Home Address: _____

Mobile Phone: _____

Email Address: _____

Marital Status (Single / Married / De facto / Separated):

Spouse Name (**if not a Coull & Prior client**): _____

Spouse Date of Birth: _____

Spouse Taxable Income: _____

No. of Dependent Children **Under 18 years**, OR **18–24 years AND a full-time student** _____

2. Changes Since Last Tax Return

Tick any that apply:

New job/Change Occupation: _____

Stopped working: _____

New EFT details (**Phone our office to update**)

Purchased investment property: _____

Sold property: _____

Sold shares: _____

Started business or ABN: _____

Other: _____

3. Income Received

Tick all that apply and **attach** records:

Bank interest

Dividends or managed funds

Sole trader / ABN income

Capital gains (shares, crypto, property)

Foreign income

Other income: _____

4. Work-Related Deductions

Tick any that apply and provide evidence:

Motor vehicle expenses

Make/Model: _____

Cents per km method:

Total work-related kilometers recorded: _____

Logbook method:

Work-Related use as per logbook: _____ %

Fuel: _____

Registration: _____

Insurance: _____

Repairs/Serviceing: _____

Other (Please specify): _____

Working from home: Total hours recorded: _____ (**Cannot be estimated**)

Electricity: \$ _____

Gas: \$ _____

Tools or equipment: \$ _____ (provide receipt for any item >\$300)

Clothing: \$ _____

Compulsory Uniform

Protective Clothing

Self-education/Training: \$ _____

Mobile phone: Monthly Plan \$ _____ Work use: _____ %

Internet: Monthly Plan \$ _____ Work use: _____ %

Other work expenses:

5. Other Deductions

Tick any that apply and provide evidence:

Donations to registered charities Amount: \$ _____

Union or professional fees Amount: \$ _____

Income protection insurance Amount: \$ _____

Other deductions Amount: \$ _____ Specify: _____

6. Rental Property

Rental property? Yes No

Please attach annual rental statement and expense documents.

- Rental summary (Agent/Self-Managed)
- Strata Levies
- Loan interest (Provide all bank statements)
- Rates (Council/Water/ESL/Land Tax)
- Insurance (Building/Landlord)
- Repairs & Maintenance (provide receipts for any item >\$300)

7. Business (Sole Trader)

Small Business? Yes No

Business Activity: _____

Business Address: _____

Please attach income and expenses documents.

8. Additional Information

Please provide any other information that may affect your tax return:

9. Sign/Approve your Tax Return

Upload to my Secure Client Portal for online approval

Attend the office in person

10. Client Declaration

I declare that the information and documents I have provided are true, complete and correct to the best of my knowledge.

I confirm that I have disclosed all income received during the financial year and that I hold appropriate records to substantiate any deductions and claims included in my tax return.

Client Name: _____

Signature: _____

Date: _____