

Individual Schedule for 2013



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Do any of these apply to you?

	Managed Fund Investments?		Rental Properties
	Investments sold?		Business
	Other issues you want to talk about?		> 5000 km's of car use for work

If so then please contact us to find out if this schedule is for you.

Section A - General Information

Client Name:		Spouse Name:	
DOB:		Spouse DOB:	
Address:	Please provide copy of spouse tax return (if not completed by WFS)		
TFN:		Your Occupation:	
Phone:		Email:	
Are you a resident for taxation purposes?			
Change in Marital Status? Enter date & Detail			
Dependants?			
Name		DOB	
Name		DOB	
Name		DOB	

Section B - Income

Salary or wages

ABN	Employer	Gross	Tax
Reportable Super			
Allowance		FBT	

Bank Interest

Bank	Amount	Tax withheld	bank charges

Dividends

Company	Unfranked	Franked	Franking credit

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Other Income			
Amount	Description	Amount	Description
Section C - Deductions			
Q1	Do you have any work related expenses?	If no skip to next section	
Q2	Did you use your personal vehicle for work?	if no skip to next question	
Engine size:		Work KM's	
Q3	Did you have work related travel?	If no skip to next question	
Taxi:		Accommodation:	
No Nights:		Location:	
Meals:		Incidentals	
Q4	Does your employer require a uniform?	If no skip to next question	
Laundry:		Purchases:	
Q5	Did you have any self education expenses?	if no skip to next question	
Total costs:			
	Did you use your car for study?	Engine size	
		km's	
<i>Do not include single assets purchased greater then \$300.00</i>			
Q6	Did you have union fees?		If no skip to next question
	Total:		
Q7	Did you purchase assets >\$300.00 for work / study purposes?		
Date	Asset description	Amount	Private %
Q8	Did you make any tax deductible donations?	If no skip to next question	
Amount	Organisation	Amount	Organisation
Q9	Did you have any other expenses not covered above?		
Amount	Description	Amount	Description
Q10	Cost of managing tax affairs		
		Amount	
Section D- Other			

Private health Insurance

Fund Name

Type of cover

Membership #

Rebate claimed?

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Are you exempt from the Medicare Levy?

Did you have medical expenses over \$2120 out of pocket?

Total Expense

Amount refunded

Out of Pocket amount

Other Queries / Comments