



# Individual Tax Return Application

Have you done individual tax return with us?  YES  NO

Which financial year are you applying for? \_\_\_\_\_

## Personal Details

Full Name: \_\_\_\_\_ DoB: \_\_\_\_\_  
*Title First Last*

Address: \_\_\_\_\_  
*Street Address Apartment/Unit #*  
\_\_\_\_\_  
*Suburb State Postcode*

Phone: \_\_\_\_\_ Email \_\_\_\_\_

Bank Name: \_\_\_\_\_

BSB Number: \_\_\_\_\_ Account Number: \_\_\_\_\_ Account Holder: \_\_\_\_\_

Are you a citizen of Australia?  YES  NO

If not, are you a permanent resident(PR)?  YES  NO

*If yes, when did you apply PR applicatin? \_\_\_\_\_  
When was your PR approved? \_\_\_\_\_*

If not, please explain your current visa condition: \_\_\_\_\_

*When did you arrive in Australia? \_\_\_\_\_*

*When is the first date of current visa effective? \_\_\_\_\_*

*When is the date of current visa expired? \_\_\_\_\_*

*Have you had any other visa prior to current visa? If yes, what type of visa did you hold? \_\_\_\_\_*

## Your Salary Income

Company: \_\_\_\_\_ Position: \_\_\_\_\_

Company: \_\_\_\_\_ Position: \_\_\_\_\_

Company: \_\_\_\_\_ Position: \_\_\_\_\_

*Please attach your income statement. (Optional)*

## Basic Claim

Do you want to do basic \$300 claim without a receipt?  
(Written evidence not required, but ATO may request)  YES  NO

## Car Expense

You can claim work-related car expenses if you use your own car in the course of performing your job as an employee, who carries bulky tools or equipment or attend work-related conferences or meetings away from your normal workplace or travel between two separate places of employment or travel from your normal workplace to an alternative workplace back to your normal workplace/directly home or perform itinerant work (or have shifting places of work).

You are required to use a logbook or diary to separate private use from work-related trips.

Have you used motor vehicles for work-related travel?      YES      NO  
(work to work travel only, except for carrying heavy tools)           

Car registration number: \_\_\_\_\_ Car model: \_\_\_\_\_

Average of km per week: \_\_\_\_\_ Total km for the financial year: \_\_\_\_\_

Reason for use / claim: \_\_\_\_\_

## Education Expense

You may be able to claim a deduction for self-education expenses if your self-education relates to your current work activities as an employee to maintain or improve the specific skills or knowledge you require in your current work activities and it is likely to result in, an increase in your income from your current work activities.

Did you have self-education expenses?      YES      NO  
(directly related to your current work)           

Course name: \_\_\_\_\_

Course Provider: \_\_\_\_\_

Reason for study: \_\_\_\_\_

Expenses amount: \_\_\_\_\_

\*You are required to upload the invoice/receipt for an expense.

## COVID-19 Home Office Expenses

If you're an employee who works from home, you may be able to claim a deduction for expenses you incur relating to that work. These can be additional running expenses such as electricity, the decline in value of equipment or furniture and phone and internet expenses.

There are few ways of calculating home office expenses depending on your circumstances. COVID 19 home office expenses from 1 March 2020 to 30 June 2021 normally use the shortcut method (80cents an hour). You must meet the record keeping requirements and working criteria to use each method.

Start date: \_\_\_\_\_ End date: \_\_\_\_\_ Total number of weeks: \_\_\_\_\_

Average working hours per week: \_\_\_\_\_

## Home Office Expenses

You can claim a deduction for additional running expenses you incur when you work from home. The fixed rate is 52 cents for each hour you work from home.

To claim using this method, you must keep records of actual hours record working at home for the year or a diary for a representative four-week period to show your usual pattern of working at home.

This method doesn't include the following, so you wиеed to separately calculate your work related use for

- phone expenses
- internet expenses
- computer consumables and stationery – such as ink
- decline in value of equipment – such as phones, computers and laptops.

To claim the work-related portion of these expenses you must have records/receipt and written evidence to identify your work-related and private portion to work out your percentage to claim.

Start date: \_\_\_\_\_ End date: \_\_\_\_\_ Total number of weeks: \_\_\_\_\_

Average working hours per week ( \_\_\_\_\_ hours)

- phone running expenses: [\$ \_\_\_\_\_ ] per month X [ \_\_\_\_\_ ]% for home office usage
- internet running expenses: [\$ \_\_\_\_\_ ] per month X [ \_\_\_\_\_ ]% for home office usage
- computer consumables and stationery – such as ink, paper and so on. [\$ \_\_\_\_\_ ]
- decline in value of equipment – such as phones, computers and laptops only but no office furniture.

List of equipment (Name)	Purchase date	Purchase amount	Percentage of work use

## Disclaimer and Signature

*I authorize that Tax123 can obtain and provide any information from/to the ATO(Australian Taxation Office) to prepare my income tax return.*

*They may contact the ATO or any employers on my taxation and superannuation affairs.*

*I also confirm Tax123 charges either an hourly rate or a flat fee for the services at the end of the consultation.*

*I certify that the above information is true and correct and agreed with the terms and condition above.*

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Please email us your completed form or upload in our website (written application – choose file – send)

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