

P J Walker & Co Pty Ltd

Income Tax | Data Sheet

2017-18 Financial Year

Please only complete information NOT already recorded in prior years

Please keep a copy of ALL documents you send to us

Date:

Name:

Date of Birth:

Address:

.....

Contact details: Work: Home:

E-mail:

Occupation:

Income

Salary/wages:

Employed by:

Earnings..... (Please enclose copy earnings statement(s))

Other Income

Australian \$	Overseas
.....
.....

Interest income: *Please show TOTAL interest income.*

Your interest	Spouse's interest	TOTAL	Bank or other payer etc.	TFN W/h tax.
\$.....	\$.....	\$.....	\$.....
\$.....	\$.....	\$.....	\$.....

Dividend income:

Unfranked	Franked	Imputation credit	Co. name
\$.....	\$.....	\$.....
\$.....	\$.....	\$.....

Deductions from dividend and **non** rental property investment income

Interest on borrowed funds	Lender
\$.....

(Rental property loan interest – see rental property schedule)

Sale of Property: *Did you sell any shares, investments, real estate, and other property?*
 YES/NO *(Other than your sole and principal residence)*

Details.....

Purchased when?	Cost?	Sold when?
.....

Any other income?

Expenses

1. Motor vehicle and work related travel expenses

Please explain how these expenses relate to your work:

.....

2. Uniform, occupation specific or protective clothing and laundry expenses

Please provide a description of the clothing items and explain why you needed them for work purposes. (NOTE: do not provide this description if you have provided this in previous years and your occupation is unchanged).

	Receipts held	Receipts not held
Laundry	\$.....	\$.....
Dry-cleaning	\$.....	\$.....
Occupation specific uniform	\$.....	\$.....
Compulsory distinctive uniform	\$.....	\$.....
Non-compulsory registered uniform	\$.....	\$.....
Protective clothing	\$.....	\$.....
Other (<i>please specify</i>)	\$.....	\$.....

3. Self Education

Please explain how these expenses related to your current work activities.

If you have estimated the portion of an expense that related to your self-education, such as computer expenses, tell us how you calculated the amount:

.....

	Receipts held	Receipts not held
Fees	\$.....	\$.....

Books, stationery etc.	\$.....	\$.....
Travel	\$.....	\$.....
Computer expenses	\$.....	\$.....
Other (<i>please specify</i>) <i>e.g. travel from study to home, childcare etc.</i>	\$.....	\$.....
TOTAL	\$.....	\$.....

4. Other work related expenses

	R e c e i p t s held	Receipts not held
Professional fees, subscriptions etc	\$.....	\$.....
Seminars, conferences	\$.....	\$.....
Books, journals and professional library	\$.....	\$.....
Home office	\$.....	\$.....
Telephone	\$.....	\$.....
Computer expenses	\$.....	\$.....
Equipment, job tools etc		
Other work related expenses: (<i>please specify</i>)	\$.....	\$.....

Please explain how these expenses related to your work. If you have estimated the work-related portion of an expense such as telephone, home office, or computer expenses, tell us how you calculated the amount.

Other

Sickness/Income insurance

Policy held with? (note: *income* benefit payable ONLY) \$..... \$.....

Superannuation \$..... \$.....

*(self employed or non employer sponsored)**(super co-contribution payment??)*

Contributions on behalf of (or by) spouse

Fund name and your reference no? \$..... \$.....

Charities/other – donations \$..... \$.....

Building funds – donations

Names: \$..... \$.....

Health InsurancePlease refer to labels on your 2017-18 *'Private Health Insurance Statement'*:

B: Health insurer ID

C: Membership number

J: Your share of premium paid in the financial year

K: Your share of Aust Govt rebate received

L: Benefit code

A: Days in tax year for private hospital cover

Dependents

Spouse Spouse's Name

Spouse's separate income \$.....

Dependent children details: Name..... D.O.B.....

Rental Property

Income from rent (note – **gross** rent before deductions) \$.

Other Income. \$

Property owned jointly? (New investments only)

Date of purchase?

Date first let?

Expenses

Interest paid to: \$

. \$

Borrowing costs paid to: \$

Rates - Council: \$

- Water: \$

Land Tax \$

Insurances - Fire: \$

- Contents: \$

Cleaning and rubbish removal: \$

.

Repairs

Plumbing: \$

Electrical: \$

Hardware items: \$

Locks and keys: \$

Other: \$

Depreciation – equipment/other/fixtures purchased

- Date of purchases:

\$

Agent's commission, lease fees: \$

Lawn, garden requisites: \$

Inspection expense; how? \$

Strata levies: \$

Bank charges: \$

Advertising: \$

Postage, telephone, stationery \$

