



CALL 08 9477 3288 TO BOOK AN APOINTMENT

PLEASE FILL OUT AND RETURN TO:
info@prestigeca.com.au
 or
 FAX: 08 9277 2208
 or
 PO BOX 472, Belmont, WA, 6984

CLIENT TAX REVIEW FORM

Personal	
Full Name	
Phone number	
Email	
Address	
TFN & Date of Birth	
Electronic funds transfer details for refund	BSB: Acct number: Acct name:
Income (Labels 1 to 24)	
Occupation / job role	
Payment summaries included	
Allowances and director fees	
Employer lump sum payments and ETPs	
Australian government allowances and pensions	
Super annuities and lump sum payments	
Bank interest	
Dividends, managed funds and employee share schemes	

PRESTIGE PARTNERS

Postal Address: PO Box 472 Belmont WA 6984 | Office Address: 15/63 Knutsford Ave Rivervale WA 6103 | Email: info@prestigeca.com.au

Web: www.prestigeca.com.au | Phone: 08 9477 3288 | Fax: 9277 2208 | ABN: 85 103 648 238

Liability limited by a scheme approved under Professional Standards Legislation.

Partnership & trust distributions	
PSI or business income	
Capital gains (property, shares - please attach purchase and sale documents)	
Foreign income	
Other income (workers comp, etc)	
Deductions (Labels D1 to D15)	
Work related car expenses (ensure correct logbook substantiation)	
Work related travel expenses	
Work related uniform & laundry expenses	
Work related self-education expenses	
Other work related expenses	
Interest & Dividend deductions	
Gifts or donations	
Tax fees paid last year	
Personal deductible super contributions	
Other deductions (income protection, etc)	
Tax offsets (Labels T1 to T14)	
Entitled to spouse, housekeeper, senior or pensioner offset? (Born before 1/7/1971, No FTB Part B)	
Private health tax offset not prev claimed via reduced premiums?	

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Medicare levy	
Private health details - insurer, member number, ancillary/hospital (statement needed)	
Number of dependent children	
Miscellaneous	
Outstanding HECS\HELP\Supplement loan debt	
Part-year tax-free threshold due to residency commence/change?	
Spouse	
Spouse full name and DOB	
Dates you had a spouse for the year	
Spouses taxable income (provide tax return)	
Rental schedule	
Address of rental property	
Ownership percentage split of property	
Date property first earned rental income	
Period property was rented this year	
Is the property managed by agent? If so, is statement provided?	
Loan interest statements for the financial year	
Depreciation schedule provided?	
Council rates, water rates, land tax, insurance, all other expenses	
Private repairs undertaken?	
Would you like us to review your investment mortgage?	

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