Individual Client Details

PO Box 233 Kemps Creek NSW 2178
Ph: 0407 018 314
Fax: (02) 9826 1874
Email: reece@speedytax.net.au

PART A To ensure our records are correct, please fill out this section if your details have changed.

NEW CLIENTS: To become a client of Speedy Taxation Services, simply fill out this form.
This will allow us to potentially access records held by the ATO to use and prepare a draft return for you. We will then contact you regarding the outcome, answer any queries which may arise and lodge your tax return for you.

EXISTING CLIENTS: If your details have changed since your last tax return, please fill out the appropriate fields.

Relevant Tax Year 2011-2012

Title ____ First Name ____ Middle Name ____ Last Name ____

Residential Address:

Street ____

Suburb ____

State ____ Post Code ____

Postal Address: ☐ Same as residential address

Street ____

Suburb ____

State ____ Post Code ____

Date of Birth ___ / ___ / ___

Tax File Number ____

ABN ____

Phone No ____ Mobile No ____ Fax No ____

Email Address ____

Form Submission Options
1. Submit by Email Button: If you are using an email client such as Microsoft Outlook, you can save the completed form and press this button at the end of the form. A new mail window will open with the form attached
2. Email Attachment: You can save the PDF file and manually attach it in an email and send to reece@speedytax.net.au
3. Post: You can print the completed form and post it to PO Box 233, Kemps Creek NSW 2178

PART B Tax Details - INCOME: Please check applicable boxes and provide appropriate documentation

Salary and Wages

☐ Yes ☐ No

Job Description

Did you earn a salary or wages? ☐ Salary ☐ Wages

Documentation: * Please Provide Group Certificate/s

Interest Earned from Bank Accounts

☐ Yes ☐ No

Bank	Amount	Witheld Tax

Documentation: * Bank Statements Showing Interest Earned
If you require more space, please add information on the last page

Government Benefits

☐ Yes ☐ No

Description - Please include documentation

Documentation: * Pension * Centrelink Benefits * Austudy etc.

Business Income

☐ Yes ☐ No

Please forward copies of all relevant bank statements, BAS summaries, MYOB files etc.
Call for more information

Shares - Dividends

☐ Yes ☐ No

Share Name	Franked	Unfranked	Franked in Credit

Documentation: * Dividend Statements
If you require more space, please add information on the last page

Foreign Income

☐ Yes ☐ No

Description: E.g. Foreign Dividends, Managed Trusts

Documentation: * Statements

Capital Gains

☐ Yes ☐ No

Did you sell a capital asset? ☐ Yes ☐ No
E.g. Investment property, shares

If yes, please provide copies of all appropriate details and documents

Rental Properties

☐ Yes ☐ No

	PROPERTY 1	PROPERTY 2
Street		
Suburb		
State		
Postcode		
Rent Received		
Other Income Reimbursements		
Council Rates		
Water Rates		
Land Tax		
Body Corp/ Strata Fees		
Insurance		
Repairs & Maintenance		
Interest Paid on Loans		
Management Fees		
Advertising		

Improvments e.g. Bathroom, Kitchen etc

Property 1 *Description*	Property 1 *Amount*	Property 2 *Description*	Property 2 *Amount*

If you have more than 2 properties, please add details on the last page
Documentation: * Yearly Agent Summary, Rates Notices, Loan Statements

Other Income

☐ Yes ☐ No

Description

Documentation: * Please provide all relevent documentation

PART C Tax Details - EXPENSES: Please check applicable boxes and provide appropriate documentation

Work Related Expenses ☐ Yes ☐ No

MOTOR VEHICLES

Did you use your motor vehicle for work? ☐ Yes ☐ No

If YES:

How many business kilometres did you travel? ____

Do you keep a log book? ☐ Yes ☐ No

Do you own the Vehicle ☐ Yes ☐ No

Make of Vehicle ____

Model ____

Year ____

Expenses

Fuel ____ Service ____

Insurance ____ Registration ____

☐ Other Amount ____

Description ____

CLOTHING

Did you purchase any clothing specific to your employment ☐ Yes ☐ No

E.g. Protection clothing, HiVis Shirts

If YES:

Item	Amount

OTHER WORK RELATED EXPENSES

Did you purchase any items specific to your employment ☐ Yes ☐ No

E.g. Stationary, Tools, Mobile Phone etc

If YES:

Item	Amount

**Please include any receipts*

Work Related Study Expenses ☐ Yes ☐ No

E.g. Courses, Seminars, Text Books. *If YES:*

Item / Description	Amount

**Please include any receipts*

Work Related Travel ☐ Yes ☐ No

E.g. Overseas, Interstate

If YES:

Description	Amount

**Please include any receipts*

Private Health Insurance ☐ Yes ☐ No

Do you have Private Health Insurace?

If YES:

Fund	Type of Cover

Did you incur medical expenses in excess of $2000 after private health claims ☐ Yes ☐ No

HECS Debt ☐ Yes ☐ No

Amount if Known ____

Spouse & Dependant Children ☐ Yes ☐ No

SPOUSE

Spouse Name ____

Spouse Date of Birth ___ / ___ / ___

Date of Marriage ___ / ___ / ___

CHILDREN

Child Name ____ DOB ___ / ___ / ___

Child Name ____ DOB ___ / ___ / ___

Child Name ____ DOB ___ / ___ / ___

Child Name ____ DOB ___ / ___ / ___

Donations

☐ Yes ☐ No

Did you make any charitable donations over $2.00. *If YES:*

Charity	Amount

**Please include any receipts*

Other Expenses

☐ Yes ☐ No

Description

Documentation: * Please provide all relevent documentation

PART D Terms & Conditions

Please read the following carefully.
Please check appropriate boxes and sign at the bottom.

Engagement of Services

By completing this form, you agree to engage the services of Speedy Taxation Services.
If this is the first time Speedy Taxation Services has prepared your tax return, you give us permission to contact your previous account for any information we require.

Payment

* All fees must be paid in full prior to lodgement of your tax return.

* Alternatively, Speedy Taxation Services maintains a trust account, where our fees can be deducted from your refund at a cost of $15.00

Please indicate which payment option you prefer

☐ Payment Prior to Lodging ☐ Trust Account - $15.00

- You agree to pay all our invoices on time and accept that if you do not pay on time we have the right to hold your papers, etc. until all outstanding fees are paid.
- Until full payment is received, tax returns will not be lodged with the ATO
- If due to late payment of account, there is insufficient time to complete your returns, you will be responsible for any late penalties incurred.

Declaration

- I acknowledge that all information provided and enclosed has been prepared by myself and is true and correct.
- You accept that we act on the basis that all the information provided is true and correct
- We will not be liable for any Australian Tax Office (ATO) investigations that find to the contrary

I Agree ☐

Date

Print Name

PART E Check List

For your convenience, the following checklist and documentation list has been provided. Please ensure you post or email the appropriate documentation.

INCOME

☐ Salary & Wages
  - Group Certificates

☐ Interest Earned on Bank Accounts
  - Bank statements showing interest earned

☐ Government Benefits
  - Pension documents
  - Centrelink documents
  - Austudy Documents

☐ Business Income
  - All relevant bank statements
  - BAS Summaries
  - MYOB Files

☐ Share Dividends
  - Dividend Statements

☐ Foreign Income
  - Statements

☐ Capital Gains
  - Documents relating to the sale

☐ Rental Properties
  - Yearly agent summary
  - Rates notices
  - Loan Statements

☐ Other Income

EXPENSES

☐ Work Related Expenses
  - Receipts

☐ Work Related Study
  - Receipts

☐ Work Related Travel
  - Receipts

☐ Private Health Insurance

☐ HECS Debt

☐ Donations
  - Receipts

☐ Other Expenses

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