

Your Tax Return

Complete the attached forms and return with any supporting documents that you have. This may include Health Fund Statement, Group Certificate & Receipts for deductions.

We are able to access the ATO system for your Group Certificate if your employer did not issue one.

Please sign at the bottom of the first page also twice on Page 3.

If funds are transferred into a wrong account because your details are not clear it is your responsibility. Please print clearly. If you prefer send a copy of a Bank Statement showing your BSB & Account Number.

As details change each year please be sure to advise on the number of dependent children under 18 or 21 if they are a full time student.

Make sure you advise of any interest you have received from your bank for any savings accounts.

IMPORTANT NOTE:

As Returns are received by Email or dropped in to the office they are placed in a cue to be done when the Accountant does not have an appointment or has a spare moment. His weekend is taken up mainly to complete these so there may be a lag in time from receiving until it is completed. Therefore generally they are not done the day it is received.

Please be patient, it will be done promptly.

CENTRAL COAST TAXATION GROUP PTY LTD

Email cctax@cctaxation.com.au

TAX YEAR

Mr Mrs Ms Miss
Family Name
First Name
Other Names
Date of Birth / /

STREET ADDRESS

No.
Street
Suburb P/Code
Phone - Home
Phone - Work
Mobile
Email
Occupation
Tax File Number

SPOUSE DETAILS

Name
Date of Birth
Taxable Income (if known or estimate)

- Weekly Appointment Drop N Go
 Drop in Appointment Post/Fax/Email

INCOME

- Yes No Are you a Sole Trader or a Contractor
 Yes No Did your Bank Pay you interest on Savings or Term Deposits
 Yes No Do you have Shares and Dividends
 Yes No Did you receive Newstart / Sickness / Age or Care Payments
 Yes No Were you paid Parenting or Maternity Payments via Centrelink
 Yes No Did you receive Super Income Stream or Lump Sum Payments
 Yes No Do you own a Rental Property or Granny Flat
 100% Share Is Rental 100% yours or shared with Partner
 Yes No Are you in a Private Health Fund
 Yes No Do you pay Income Protection Insurance (Not via Super)
 Yes No Do you owe HECS (HELP) or Student Loans
 Do you have Dependant Children - How many _____

WORK EXPENSES

- Yes No Do you use your car for work purposes
 Yes No Do you Launder your Work Uniform or Protective or Fluro's
 Yes No Does your work involve working outdoors at times & need Sun Protection
 Yes No Did you do Courses / Training / Seminars or Workshops

\$ _____ Tools	\$ _____ Sun Screen & Hats
\$ _____ Mobile & % use	\$ _____ Sun Glasses
\$ _____ Internet & % use	\$ _____ Uniform Purchases
\$ _____ Donations	\$ _____ Boots (Protective)
\$ _____ Stationery	\$ _____ Shoes (Specify type)
\$ _____ Accommodation	\$ _____ Computer / Laptop & % Use
\$ _____ Taxi	\$ _____
\$ _____ Tolls	\$ _____

I hereby authorise My Tax Agent/Accountant;

- To endorse for and on my behalf any Income Tax Refund payment received on my behalf and receipt into a designated Trust Account.
- If Fees are not paid on the day my Tax Return was completed and signed it is acknowledged that I have a debt to My Tax Agent/Accountant.
- I authorise you to deduct from my Tax Refund any unpaid Fees or charges, and any other debts owing by me to My Tax Agent/Accountant, then to remit the balance of any proceeds, if any, to me at my last known address or Bank Account.
- In the event that the situation arises where there is no refund or insufficient refund to enable Fees & Debts to be deducted then I undertake to pay these Fees & Debts within 14 days My Tax Agent/Accountant receives such notice from the Taxation Office.
- I acknowledge that failure to PAY any Fees or Charges in relation to my Tax Return, and any other Debts owing by me to My Tax Agent/Accountant will result in Legal Action taken against me to recover the amounts owing. I will also be held liable for any costs incurred in the recovery of the Fees including Commercial Agent's Commissions being 35% of the debt which is recoverable from me pursuant to this agreement.
- I acknowledge that any unpaid Debts will attract Interest at the rate calculated by the Court.
- To the best of my knowledge at the time of preparation of my Income Tax Return I have declared all my Income including but not limited to Bank Interest, Centrelink Income, Pensions & Overseas Income. My Tax Agent/Accountant is not responsible for any income not declared on my Tax Return.
- I have provided valid information in regards to my deductions and accept any responsibility should any deduction be found not valid. All due care and skill has been taken by the Accountant to only include deductions appropriate for me and may decline deductions I have provided based on their Professional opinion and Taxation Ruling.
- I acknowledge that during the preparation of my Income Tax Return where I have provided many receipts that are not tallied then an additional charge may apply for Bookkeeping. This includes receipts for Business Activity, Rental Properties & Work Related Expenses.
- I acknowledge that at other times I may be charged other Fees for Work or Services provided as My Tax Agent/Accountant see fit. I am also aware that there will be charges for providing additional copies of Tax Returns requested by me. I also understand that it is my responsibility to retain copies of all paperwork supplied as I will be charged additional Fees for retrieval and photocopying. If I request paperwork to be faxed or emailed this will also incur additional Fees and is to be paid upon request. It is my responsibility not to misplace any Taxation or Financial Paperwork.
- If the Accountant feels that it is important to amend my Income Tax Return I authorise this to be carried out with or without further consultation.
- If in future years the Accountant feels the need to Lodge Income Tax Returns as "Not Required" or Lodge Returns with Income under the Tax Threshold or Lodge Returns with no Income where the Tax Portal will not allow my Return to be marked "Not Required" then I authorise this with or without further consultation in order to ensure my future obligations are met with the Taxation Office to avoid penalty. If any Refund is received for either of these Lodgements then I authorise My Tax Agent/Accountant to deduct any Fee in whole or part as compensation for fulfilling my Taxation Obligations.
- I authorise My Tax Agent/Accountant Staff with or without consultation to myself to deal with the Taxation Office on my behalf as deemed necessary in the future.
- If this authority is not signed then it is accepted that you agree to these terms based on you supplying your paperwork to proceed with your Tax Return.
- It is understood and agreed that these terms may alter or additions included without my knowledge. All terms and conditions are made available in the Office at all times.

Signed by Taxpayer or Authorised Representative