Yarrawonga VIC 3730 **Ph:** (03) 5744 3861



Web: www.obryanodonnell.com.au
Email: info@obryanodonnell.com.au

ABN: 34 420 868 298

Client Details Form 2019 Individual Income Tax Return

Full Name				
Tax File Number			_	
Date of birth		//		
ABN (if applicable)				
Address				
Address (postal) (Put 'as above' if the same)				
	Mobile:			
Telephone contacts	Business Hours (work) :			
	After Hours (home):			
Email		@		
Electronic banking	BSB:			
(for refund if applicable)	Account Number:			
Occupation				
	Do you run your own bu	ısiness as a sole trader?	YES/NO	
	Do you run your own bu	ısiness in a company, trust or pa	rtnership? YES/NO	
Spouse's full name				
(Please include married/de	facto/same-sex)			
Spouse's date of birth				
Spouse's TFN				
Approximate Income (if known	own)			

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Inco	ome – Please provide eviden	ce		Yes	No	Unsure
alary o	r wages					
•	provide all PAYG Payment Summari	•	•			
	ayroll) from 31/7) applicable to the statement or PAYG Payment Sumn		•	ided with eith	ner an em	oloyment
icome :	Payer's ABN	Gross Payment	<i>'.</i>	Tax Wi	ithheld	
١						
3					•	1
1.	Allowances, earnings, tips, director	or's fees etc.				
2.	Employer lump sum payments					
3.	Employment termination paymer	nts				
4.	Australian Government allowance	es and payments like Newstart, Yo	outh Allowance an	d		
	Austudy payments					
5.	Australian Government pensions	and allowances				
6.	Australian annuities and superani	nuation income streams				
7.	Australian superannuation lump s	sum payments				
8.	Attributed personal services incor	me				
9.	Gross Interest					
٥.	Bank	Account #	Amount		Joint?	
	a)					
	b)c)				•••••	
10.	Dividends					<u> </u>
11.	Employee share schemes					
	Distributions from partnerships a	nd/or trusts				
	Personal services income (PSI)	<u> </u>				
	Net income or loss from business	(as a sole trader)				
	Deferred non-commercial busines	<u> </u>				
	Net farm management deposits o					
	Capital gains					
_ 18.	Foreign entities: Direct or indirect interests in a co	ntrolled foreign company				
_	Transfer of property or services to	•				
19.	Foreign source income (including		sets or property			
20.	Rent (provide documentation)					
	- Do you have one or more rental					
21	- Did you buy or sell any property					
	Bonuses from life insurance comp	•				
	Forestry managed investment sch					
23.	Other income (please specify belo	ow)				
				·		

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Deductions – Please provide evidence	Yes	No	Unsur
D1. Work related car expenses			
• Cents per kilometre method (up to a maximum of 5,000 kms)			
Log book method			
D2. Work related travel expenses			
Employee domestic travel with a reasonable travel allowance			
• If the claim is more than the reasonable travel allowance rate, do you have receipts for			
your expenses?			
Overseas travel with a reasonable travel allowance			
Do you have receipts for accommodation expenses?			
• If travel is for 6 or more nights in a row, do you have travel records (e.g. a travel diary)?			
Employee travel without a reasonable travel allowance			
Did you incur and have receipts for airfares?			
Did you incur and have receipts for accommodation?			
Did you incur and have receipts for hire cars (if applicable)?			
Did you incur and have receipts for airfares?			1
Did you incur and have receipts for meals and incidental expenses?			1
Do you have any other travel expenses?			
Other work-related travel expenses (e.g. a borrowed car, public transport)			
(Please Specify)			
			1
D3. Work-related uniform and other clothing expenses			
Protective Clothing			Т
Occupation Specific Clothing			1
Non-compulsory uniform			
Compulsory uniform			
Conventional clothing			
Laundry expenses (up to \$150 without receipts)			
Dry cleaning expenses			
Other claims such as mending/repairs, etc. (please specify)			+
··		<u> </u>	

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D4. Work related self-education expenses Course taken at educational institution: Union fees Course fees Books, stationery Travel Other (Please specify) D5. Other Work-related expenses Home Office Expenses Computer and software Telephone/mobile phone Tools and equipment Subscriptions and union fees Journals or periodicals Depreciation Sun protection products (i.e. sunscreen and sunglasses) Seminars and courses not at an educational institution Any other work-related deductions D6. Low value pool deduction D7. Interest deductions D8. Dividend deductions D9. Gifts or donations Litigation costs Interest charged by the ATO (e.g. including SIC and GIC) Tax Agent/accounting fees Litigation costs Other expenses incurred in managing tax affairs	Deductions (Continued) – Please provide evidence	Yes	No	Unsure
Union fees Course fees Books, stationery Travel Other (Please specify) D5. Other Work-related expenses Home Office Expenses Computer and software Telephone/mobile phone Tools and equipment Subscriptions and union fees Journals or periodicals Depreciation Sun protection products (i.e. sunscreen and sunglasses) Seminars and courses not at an educational institution Any other work-related deductions (please specify) Other Types of Deductions D6. Low value pool deduction D7. Interest deductions D8. Dividend deductions D9. Gifts or donations D10 Cost of managing tax affairs Interest charged by the ATO (e.g. including SIC and GIC) Tax Agent/accounting fees Littigation costs	D4. Work related self-education expenses	_		
Course fees Books, stationery Travel Other (Please specify) D5. Other Work-related expenses Home Office Expenses Computer and software Telephone/mobile phone Tools and equipment Subscriptions and union fees Journals or periodicals Depreciation Sun protection products (i.e. sunscreen and sunglasses) Seminars and courses not at an educational institution Any other work-related deductions (please specify) Other Types of Deductions D6. Low value pool deduction D7. Interest deductions D8. Dividend deductions D9. Gifts or donations D10 Cost of managing tax affairs Interest charged by the ATO (e.g. including SIC and GIC) Tax Agent/accounting fees Litigation costs	Course taken at educational institution:			
Books, stationery Travel Other (Please specify) D5. Other Work-related expenses Home Office Expenses Computer and software Telephone/mobile phone Tools and equipment Subscriptions and union fees Journals or periodicals Depreciation Sun protection products (i.e. sunscreen and sunglasses) Seminars and courses not at an educational institution Any other work-related deductions (please specify) Other Types of Deductions D6. Low value pool deduction D7. Interest deductions D8. Dividend deductions D9. Gifts or donations D10 Cost of managing tax affairs Interest charged by the ATO (e.g. including SIC and GIC) Tax Agent/accounting fees Litigation costs	Union fees			
Travel Other (Please specify) D5. Other Work-related expenses Home Office Expenses Computer and software Telephone/mobile phone Tools and equipment Subscriptions and union fees Journals or periodicals Depreciation Sun protection products (i.e. sunscreen and sunglasses) Seminars and courses not at an educational institution Any other work-related deductions (please specify) Other Types of Deductions D6. Low value pool deduction D7. Interest deductions D9. Gifts or donations D10 Cost of managing tax affairs Interest charged by the ATO (e.g. including SIC and GIC) Tax Agent/accounting fees Litigation costs	Course fees			
Other (Please specify) D5. Other Work-related expenses Home Office Expenses Computer and software Telephone/mobile phone Tools and equipment Subscriptions and union fees Journals or periodicals Depreciation Sun protection products (i.e. sunscreen and sunglasses) Seminars and courses not at an educational institution Any other work-related deductions (please specify) Other Types of Deductions D6. Low value pool deduction D7. Interest deductions D8. Dividend deductions D9. Gifts or donations D10 Cost of managing tax affairs Interest charged by the ATO (e.g. including SIC and GIC) Tax Agent/accounting fees Litigation costs	Books, stationery			
D5. Other Work-related expenses Home Office Expenses Computer and software Telephone/mobile phone Tools and equipment Subscriptions and union fees Journals or periodicals Depreciation Sun protection products (i.e. sunscreen and sunglasses) Seminars and courses not at an educational institution Any other work-related deductions (please specify) Other Types of Deductions D6. Low value pool deduction D7. Interest deductions D8. Dividend deductions D9. Gifts or donations D10 Cost of managing tax affairs Interest charged by the ATO (e.g. including SIC and GIC) Tax Agent/accounting fees Litigation costs	Travel			
Home Office Expenses Computer and software Telephone/mobile phone Tools and equipment Subscriptions and union fees Journals or periodicals Depreciation Sun protection products (i.e. sunscreen and sunglasses) Seminars and courses not at an educational institution Any other work-related deductions (please specify) Other Types of Deductions D6. Low value pool deduction D7. Interest deductions D8. Dividend deductions D9. Gifts or donations D10 Cost of managing tax affairs Interest charged by the ATO (e.g. including SIC and GIC) Tax Agent/accounting fees Litigation costs	Other (Please specify)			
Home Office Expenses Computer and software Telephone/mobile phone Tools and equipment Subscriptions and union fees Journals or periodicals Depreciation Sun protection products (i.e. sunscreen and sunglasses) Seminars and courses not at an educational institution Any other work-related deductions (please specify) Other Types of Deductions D6. Low value pool deduction D7. Interest deductions D8. Dividend deductions D9. Gifts or donations D10 Cost of managing tax affairs Interest charged by the ATO (e.g. including SIC and GIC) Tax Agent/accounting fees Litigation costs		-1	L	
Home Office Expenses Computer and software Telephone/mobile phone Tools and equipment Subscriptions and union fees Journals or periodicals Depreciation Sun protection products (i.e. sunscreen and sunglasses) Seminars and courses not at an educational institution Any other work-related deductions (please specify) Other Types of Deductions D6. Low value pool deduction D7. Interest deductions D8. Dividend deductions D9. Gifts or donations D10 Cost of managing tax affairs Interest charged by the ATO (e.g. including SIC and GIC) Tax Agent/accounting fees Litigation costs				
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Subscriptions and union fees Journals or periodicals Depreciation Sun protection products (i.e. sunscreen and sunglasses) Seminars and courses not at an educational institution Any other work-related deductions (please specify) Other Types of Deductions D6. Low value pool deduction D7. Interest deductions D8. Dividend deductions D9. Gifts or donations D10 Cost of managing tax affairs Interest charged by the ATO (e.g. including SIC and GIC) Tax Agent/accounting fees Litigation costs	Telephone/mobile phone			
Journals or periodicals Depreciation Sun protection products (i.e. sunscreen and sunglasses) Seminars and courses not at an educational institution Any other work-related deductions (please specify) Other Types of Deductions D6. Low value pool deduction D7. Interest deductions D8. Dividend deductions D9. Gifts or donations D10 Cost of managing tax affairs Interest charged by the ATO (e.g. including SIC and GIC) Tax Agent/accounting fees Litigation costs	Tools and equipment			
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Sun protection products (i.e. sunscreen and sunglasses) Seminars and courses not at an educational institution Any other work-related deductions (please specify) Other Types of Deductions D6. Low value pool deduction D7. Interest deductions D8. Dividend deductions D9. Gifts or donations D10 Cost of managing tax affairs Interest charged by the ATO (e.g. including SIC and GIC) Tax Agent/accounting fees Litigation costs	Journals or periodicals			
Seminars and courses not at an educational institution Any other work-related deductions (please specify) Other Types of Deductions D6. Low value pool deduction D7. Interest deductions D8. Dividend deductions D9. Gifts or donations D10 Cost of managing tax affairs Interest charged by the ATO (e.g. including SIC and GIC) Tax Agent/accounting fees Litigation costs	Depreciation			
Any other work-related deductions (please specify) Other Types of Deductions D6. Low value pool deduction D7. Interest deductions D8. Dividend deductions D9. Gifts or donations D10 Cost of managing tax affairs Interest charged by the ATO (e.g. including SIC and GIC) Tax Agent/accounting fees Litigation costs	Sun protection products (i.e. sunscreen and sunglasses)			
Other Types of Deductions D6. Low value pool deduction D7. Interest deductions D8. Dividend deductions D9. Gifts or donations D10 Cost of managing tax affairs Interest charged by the ATO (e.g. including SIC and GIC) Tax Agent/accounting fees Litigation costs	Seminars and courses not at an educational institution			
D6. Low value pool deduction D7. Interest deductions D8. Dividend deductions D9. Gifts or donations D10 Cost of managing tax affairs • Interest charged by the ATO (e.g. including SIC and GIC) • Tax Agent/accounting fees • Litigation costs	Any other work-related deductions (please specify)			
D6. Low value pool deduction D7. Interest deductions D8. Dividend deductions D9. Gifts or donations D10 Cost of managing tax affairs • Interest charged by the ATO (e.g. including SIC and GIC) • Tax Agent/accounting fees • Litigation costs				
D6. Low value pool deduction D7. Interest deductions D8. Dividend deductions D9. Gifts or donations D10 Cost of managing tax affairs • Interest charged by the ATO (e.g. including SIC and GIC) • Tax Agent/accounting fees • Litigation costs	Other Types of Deductions			
D7. Interest deductions D8. Dividend deductions D9. Gifts or donations D10 Cost of managing tax affairs • Interest charged by the ATO (e.g. including SIC and GIC) • Tax Agent/accounting fees • Litigation costs		T	Π	I
D8. Dividend deductions D9. Gifts or donations D10 Cost of managing tax affairs • Interest charged by the ATO (e.g. including SIC and GIC) • Tax Agent/accounting fees • Litigation costs				
D9. Gifts or donations D10 Cost of managing tax affairs Interest charged by the ATO (e.g. including SIC and GIC) Tax Agent/accounting fees Litigation costs				
D10 Cost of managing tax affairs Interest charged by the ATO (e.g. including SIC and GIC) Tax Agent/accounting fees Litigation costs				
 Interest charged by the ATO (e.g. including SIC and GIC) Tax Agent/accounting fees Litigation costs 				
Litigation costs				
	Tax Agent/accounting fees			
Other expenses incurred in managing tax affairs				
D11. Deductible amount of undeducted purchase price of a foreign pension or annuity				

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Deductions (Continued) – Please provide evidence	e	Yes	No	Unsure
D12. Personal superannuation contributions	_			
Full name of fund	Account Number:			
Fund ABN:	Fund TFN:			
Have you provided the fund a notice of intention to	deduct the contribution?			
Has this notice been acknowledged by the fund?	Has this notice been acknowledged by the fund?			
Other types of deductions (continued)				
D13. Deduction for project pool				
D14. Forestry managed investment scheme deduction				
D15. Other deductions (please specify)				
L1. Tax losses of earlier income years				

Tax offsets/rebates – Please provide evidence	Yes	No	Unsure
T1. Are you a senior Australian or pensioner?			
T2. Did you receive an Australian superannuation income stream?			
T3. Did you make superannuation contributions on behalf of your spouse?			
T4 Did you live in a remote area of Australia or serve overseas with the Australian Defence			
Force or the UN armed forces in the 2019 income year?			
T5. Did you have net medical expenses for disability aids, attendant care or aged care in the			
2019 income year?			
T6. Did you maintain a dependant who is unable to work due to invalidity or carer			1
obligations in the 2019 income year?			
T7. Are you entitled to claim the landcare and water facility tax offset?			1
T8. Are you involved in an early stage venture capital limited partnership?			
T9. Are you an early stage investor in an early stage innovation company?			1
T10. Are you entitled to any other non-refundable tax offsets? (Please specify below)			1
T11. Are you entitled to any other refundable tax offsets? (Please specify below)			1

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C	ther relevant information – Please provide evidence	Yes	No	Unsure
A.	Are you entitled to the Medicare levy exemption or reduction in the 2019 income year?			
	If yes, please specify:			
В.	Did you and your spouse/dependants have private health insurance in the 2019 income year?			
C.	(If yes, please provide the annual statement received from your health fund) Were you under 18 years old on 30 June 2019?			
D.	Did you become an Australian tax resident at any time during the income year?			
E.	Did you cease to be an Australian tax resident at any time during the income year?			
F.	Did you make a non-deductible (non-concessional) personal super contribution?			
G.	Do you have a HELP liability, Student Financial Supplement Loan debt, Student Start-Up Load debt or Trade Support Loan debt?			
Н.	Are you a working holiday maker in Australia on a 417 (working holiday) visa or 462 working holiday) visa?			
I.	Did a trust or company distribute income to you in respect of which Family Trust Distribution Tax (FTDT) was paid by the trust or company? (Please specify below)			
J.	Do you have a loan with a private company at 30 June 2019 or has such a loan amount been forgiven in the 2019 income year? Has a private company made a payment to you in the 2019 income year (other than a dividend)? (Please specify below)			
K.	Did you receive any benefit from an employee share acquisition scheme?			
L.	Family Tax Benefit ('FTB'):			
•	Did you have care of a dependent child in the 2019 income year?			
•	Did you or your spouse receive FTB through the Department of Human Services in the			
	2019 income year?			
Ir	ncome Tests information			
•	Do you have any reportable fringe benefits amounts in the 2019 income year?			T
_	Do you have any reportable employer superannuation contributions in the 2019 income			
•				
•	year?			
•				
	year?			
•	year? Did you receive any tax-free government pensions in the 2019 income year?			
•	year? Did you receive any tax-free government pensions in the 2019 income year? Did you receive any target foreign income in the 2019 income year?			
•	year? Did you receive any tax-free government pensions in the 2019 income year? Did you receive any target foreign income in the 2019 income year? Did you have a net financial investment loss in the 2019 income year?			

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Other relevant information – Please provide evidence	Yes	No	Unsure
Spouse Details (if applicable)	_		
 Did you have a spouse for the full year from 1 July 2018 to 30 June 2019? If you had a spouse for only part of the income year, please specify the dates between 1 July 2018 to 30 June 2019 when you had a spouse? From / / to / / 			
What was your spouse's taxable income for the 2019 income year?	\$		
Does your spouse have a share of trust income on which the trustee is assessed under			
Section 98 that has not been included in your spouse's taxable income?			
Did a trust or company distribute income to your spouse in respect of which family trust			
distribution tax was paid by the trust or company for the 2019 income year?			
Did your spouse have any reportable fringe benefits amounts for the 2019 income year?			
Did your spouse receive any Australian Government pensions or allowances (not including			
exempt pension income) in the 2019 income year?			
Did your spouse receive any exempt pension income in the 2019 income year?			
Did your spouse receive any tax-free government pensions paid under the Military			
Rehabilitation and Compensation Act 2004?			
Does your spouse have any reportable employer superannuation contributions or			
deductible personal superannuation contributions for the 2019 income year?			
Did your spouse receive any 'target foreign income' in the 2019 income year?			
Did your spouse have a total net investment loss (i.e., the total of any financial investment			
loss and a rental property loss) for the 2019 income year?			
Did your spouse pay child support during the 2019 income year?			
If your spouse is aged between their preservation age and 59 years old, did they receive a			
superannuation lump sum (other than a death benefit) during the 2019 income year that			
included a taxed element that does not exceed their low rate cap?			
Additional notes/concerns:			
Dated:/			
Signature of taxpayer:			
Name (Print)			