

# 30 JUNE 2011 INDIVIDUAL TAX QUESTIONNAIRE

Once you have completed the "**2011 Tax Questionnaire**" please mail it with your PAYG Payment Summaries and other relevant documents to:

BSA Partnership Pty Ltd  
Level 15, 461 Bourke Street  
Melbourne, Victoria 3000

**Contact Details:**

Phone: (03) 9604 8400

Website: [www.bsapartnership.com.au](http://www.bsapartnership.com.au)

Fax: (03) 9604 8484

Email: [bsa@bsapartnership.com.au](mailto:bsa@bsapartnership.com.au)

<b>2011 Resident Individual Tax Rates</b> <b>Threshold Rate (%)</b> <b>(excluding Medicare levy)</b>	<b>Government Super Co-Contributions</b>
\$0 - \$6,000	0%
\$6,001 - \$37,000	15%
\$37,001 - \$80,000	30%
\$80,001 - \$180,000	37%
\$180,001 & Above	45%

The ATO will automatically calculate the co-contribution you are eligible for, if you have un deducted contributions and fall within the relevant income ranges. They will automatically pay this amount into your superannuation fund.

<b>Child Care Rebates</b>	<b>Mature Age Worker Tax Offset</b>
The Child Care Rebate will now be available as a direct payment from the Government rather than parents having to wait until tax time to claim the rebate.	The Government will continue to provide a tax offset of \$500 for people over the age of 55 who choose to stay in the workforce. The offset will gradually phase out once taxable income reaches \$53,001.

## IMPORTANT NOTE – WORKFLOW MANAGEMENT

a) Is your Return required urgently (in peak period August / December there is a six to eight week turnaround).

Yes  No  (refer B)

b) Otherwise, please Indicate your desired turnaround period:

9 – 15 weeks       16 – 24 weeks       Anytime before Due Date

<b>NAME:</b>		
<b>PHONE BUSINESS :</b>		
<b>PHONE HOME:</b>		
<b>PHONE MOBILE:</b>		
<b>EMAIL ADDRESS:</b>		
<b>NAME OF SPOUSE:</b>		<b>DATE OF BIRTH:</b>
<b>NAMES OF DEPENDANT CHILDREN:</b>		

**HECS/HELP Debt:** If you have attended university now or in the past and are paying off your fees through HELP then please provide us with your HELP statement dated 30/06/2011 to include in your return.

How would you like your refund paid to you (if you get one)?

Method of Payment	BSB Number	Account Number	Account Name	Please tick preferred option
Cheque	N/A	N/A	N/A	
Direct Deposit				

**INCOME:**

**1. PAYG Payment Summaries**

(Including pensions)

Yes  No

Number of certificates attached \_\_\_\_\_

Occupation \_\_\_\_\_

**2. Other Salary income:**

(Includes any directors' fees, commissions, Centrelink benefits etc.)

\_\_\_\_\_  
\_\_\_\_\_

**3. Termination Payments**

(If you received a lump sum termination please provide Eligible Termination Statement – ETP Statement)

Applicable

Yes  No

**4. Interest**

(money received on your bank accounts)

Name of Bank	Account Number	Total Interest Received \$	TFN Withholding \$	Joint Account – Yes/No

**5. Dividends**

Please provide copies of any dividend statements received. Also note that if you are a part of a dividend reinvestment plan (DRP), which means you don't physically receive money in your bank account, this means the fund uses that money to buy you more shares that this is still income and must go in your return.

Company Name	# of Shares Held	Franked Amount	Imputation Credit	Unfranked Amount	Tax Withheld

**6. Employee Share Schemes:**

Did you receive any shares through an employee share scheme for the 2011 financial year (i.e. shares as part of your employment package)? If so, please attach the Employee share scheme: employee summary to this checklist.

**7. Trusts and Partnerships:**

If income is received from a private Trust or Partnership, please provide the associated income tax return detailing the distributions received.

If the Trust income is received from a public or listed entity, please provide a copy of the 30 June 2011 tax summary.

Please list the funds below:

Name of Trust or Partnership:

**8. Capital Gain:**

Did you sell any assets such as shares or property which were acquired after 20 September 1985?

Applicable Yes  No

If yes then please provide documentation (i.e. purchase and sale settlement statements) and complete the below boxes.

**Shares:**

Company Name	# of Shares	Date of purchase	Total Purchase Price	Date of Sale	Proceeds from Sale

**Rental Property:**

Address of Property	Date of Purchase	Total Price	Date of Sale	Proceeds from Sale

**9. Rental Income:**

Please attach details of the rent received and all expenses in their separate categories. Please supply settlement sheets and purchase documents for property acquired after 1 July 2010.

Should you require the services of a Quantity Surveyor for a depreciation report please contact your client manager for a referral/form of the firm we use.

Rental Property Address	Rental Schedule Attached? Y/N	Expense Documents Attached? Y/N	Repairs & Maintenance Documents Attached? Y/N	Capital Items Purchased Documents Attached? Y/N

**10. Foreign source income:**

Did you receive any income from a non Australian source after 1 July 2010? Some examples include; receiving a foreign pension or annuity, receiving income from foreign employment or foreign salary and wages. Please provide details of the amounts received and country the income was received from.

Fund Name	Country	Income Type i.e. Shares	Gross Foreign Income	Tax Credits

**11. Any other income:**

Any income you received in the financial year which does not fit into any of the above categories please provide details.

Payment Type	Gross Benefit	Tax Deducted	Supporting Documentation Attached? Y/N

**DEDUCTIONS:**

*Please ensure you are able to substantiate all claims, even if less than \$300.*

**1. Motor Vehicle:**

Did you use your own car for business / work purposes through the year:

Yes  No

If yes then please provide one of the following:

**Log Book Method – Business % use:**

(please ensure you keep a log book for a continuous period of 12 weeks)

Expenses Incurred	Amount \$	Documentation Attached? Y/N
Petrol & Oil		
Registration		
Insurance		
Repairs & Services		
Lease Payments (Documentation Required)		
Tyres & Wheels		
Parking		
Other Expenses:		

If you have a loan for the vehicle please provide details of the interest you paid over the year and the cost of the car, if you have a hire purchase please provide a copy of the finance or Hire Purchase contract.

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**Kilometres Method:**

You haven't kept a log book but use your car for work. Let us know how many kilometres you would have travelled for work. The maximum the tax office allows you to claim under this method is 5,000 kilometres.

Car Make & Model	Year	Car Engine Size (Litres)	Kilometres Travelled

**2. Work Uniform:**

Do you have to wear a uniform with a logo, clothing specific to your occupation or protective clothing?

Yes  No

If yes were you out of pocket through the year for purchasing any new items (if so please complete the below details and please attach documentation).

Details	Compulsory or Non-compulsory Uniform	Occupation Specific Clothing Y/N	Protective Clothing Y/N	Dry Cleaning Y/N	Laundry Y/N	Sun/Cold Protection Y/N

If you answered yes to laundry expenses, please provide details such as:

- number of loads of laundry during the year
- were the clothes either washed separately or together with conventional clothing etc

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**3. Work Related Deductions:**

Eg – diary, stationery, work materials, union fees, professional membership fees

Work Related Deductions	Amount \$	Documentation Attached? Y/N	Comments

**4. Donations**

Donations	Amount \$	Documentation Attached? Y/N	Comments

**5. Other Deductions**

Eg – Professional Fees, Income Protection Insurance, Seminar Costs, Self Education Costs

Other Deductions	Amount \$	Documentation Attached? Y/N	Comments

**6. Working from Home Allowance**

If you work from home during the year please provide an estimate of how many hours you worked over any 4 week period.

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**7. Home Office:**

If you perform some of your work from your home office, you may be able to claim a deduction for the costs you incur in running your home office. Please provide details of the home office including: floor space it takes up compared to the rest of the house, what the office is used for etc). Also please provide details of expenses of running that home office (electricity, gas etc).

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**8. Other:**

(Any costs you incurred that was directly related to your job). Please provide details.

Other Expenses	Amount \$

**9. Personal Superannuation Contributions:**

If you have made any personal superannuation contributions for yourself or spouse, please attach any details of any contributions made and details of the fund it had been paid to.

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**REBATES:**

**1. Private Health Insurance:**

Do you (and your family) have private health insurance? Yes  No

If yes please provide us with copy of the health fund statement they send you after the end of the financial year, this will tell us if you are entitled to a rebate.

Provider Name	Health Fund ID	Membership Number	Type of Cover, eg – Combined, Hospital	Dates of Membership

**2. Spouse**

Did you have a spouse for the full financial year? Yes  No

Is your spouse dependant (earns less than \$9,426)? Yes  No

Does your spouse receive any benefits from Centrelink? Yes  No

Details of benefits:

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**3. Child Support:**

Did you make any child support payments for the 2010/11 financial year?

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**4. Medical Expenses:**

You may be entitled to a rebate if your out of pocket expenses on medical exceeds \$2,000 (This means if you are in a private health fund, the portion of which you don't get money back.) (Medical Expenses cannot include any cosmetics or non prescription medication).

If the total medical expenses exceed \$2,000 you are entitled to a 20% rebate on the amount over the \$2,000 threshold.

Please note – you can access this information online – go to

[www.medicareaustralia.gov.au/online](http://www.medicareaustralia.gov.au/online)

Please provide a summarised total of your expenses (the out of pocket amounts only).

Medical Expense	Amount	Documentation Provided? Y/N

**5. Education Tax Refund**

Your eligibility for the Education Tax Refund is dependent on you first being eligible for Family Tax Benefit Part A.

Did you have any expenses relating to primary or secondary school education for your children or yourself during the year? These expenses include items like computers, educational software, textbooks and stationery. (Please provide/attach details including any receipts)

Education Expenses	Child Name	Documentation Provided? Y/N	Amount \$	Primary or Secondary School

**6. Other:**

Any other information which you are unsure of category and would like us to be aware of:

Detail	Amount \$	Documentation Provided? Y/N