

# 2011 Tax Questionnaire

## Make your 2011 Tax Return easy For just \$240\*

Completing Heffernan Crawford Accountants' "2011 Tax Questionnaire" can save you time and money in preparing this year's tax return. It might even make it possible to complete this year's return without the expense of a long tax consultation.

Once we have reviewed your questionnaire response, we will contact you to clarify any issues it raises.

Alternatively, if you want to discuss any issues on taxation, please make an appointment with one of our tax experts by phoning or e-mailing us.

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

**Heffernan Crawford Partners Pty Ltd**  
PO Box 345  
Kew Vic. 3101

Alternately you can contact us at:

**Level 1, 1/233 High Street Kew Vic. 3101**  
Phone: 03 9853 1000  
Fax: 03 9853 8298  
Email: [admin@heffernancrawford.com.au](mailto:admin@heffernancrawford.com.au)  
Website: [www.heffernancrawford.com.au](http://www.heffernancrawford.com.au)

### About this questionnaire

The Australian Tax Office (ATO) allows different claims for various professions and jobs. We have designed this questionnaire to suit the majority of our clients\*\*, so we can identify the maximum amount of tax deductions you can claim according to how you earn your income.

When we complete your return, we will send it to you for your review and signature, it will include our estimate of the amount of money the ATO owes you, or the amount you may owe the tax office.

\* Rental properties, investment & business items, Family Tax Benefit schedules and Capital Gains calculations etc. will incur an additional cost. Includes GST.

\*\* The questionnaire's reference to teachers does not affect its relevance to most professions or jobs.

## Supporting your claims

Each year, the Tax Office focuses on work-related expense claims. It is still important that you keep accurate receipts and records to substantiate these claims, including log books for vehicle claims of more than 5,000 km. Reasonable estimates may be used for claims of less than 5,000 kms.

Please note, valid tax invoices must be retained for claims made in your tax return for 5 years after lodgment. For amounts less than \$10, receipts are not required up to a total of \$200, but full details must be recorded.

This year, the ATO is very keen on reviewing claims associated with investments and compliance issues for superannuation. It has established data links with organisations like banks, Centrelink and the State Revenue Office to compare tax returns with other information collected by those organisations. So don't assume the ATO will "never know" about the interest you earn from savings accounts, or social welfare benefits or assistance you may receive.

Superannuation, particularly self-managed super, is facing greater scrutiny. The ATO is determined to ensure super is put away for retirement and that taxpayers are not finding ways to access their super earlier, either directly or indirectly.

In the latter case, this means investment in holiday homes through a super fund, buying art to hang in the house or office, or using cash from super to pay off loans and so on.

If you have investments in shares or property, make sure that the interest you claim on any borrowed money is specifically for earning income and/or capital gain from your investments.

### PLEASE REMEMBER:

The ATO can audit any taxpayer's return. If your return is selected, you don't want to end up paying back tax, interest on unpaid tax and possibly fines because you failed to properly account for any income or expenses in your 2010-2011 income tax return.

On a positive note, ensure you benefit from any entitlements available through the taxation system, including:

- Superannuation Co-contribution.
- Family Tax Benefit (direct through Centrelink).
- Self assessment. You must support claims with the appropriate substantiation.

## Substantiation Declaration

Name

I,

HAVE READ AND UNDERSTOOD THE SUBSTANTIATION DECLARATION AND CAN FULLY SUBSTANTIATE ANY CLAIMS I HAVE MADE.

Signature

Date

/  /

Please note: This section must be signed.

## Payment Options

Please DEDUCT my fee of \$  from:

My Credit Card

Visa

Mastercard

Cardholder Name

Card Number

Expiry Date

/

Signature

## Please DEPOSIT my refund into:

Institution

Account Name

BSB Number

Account/Member Number

Signature

Date

/  /

•••Please ensure you complete ALL preferred payment/ deposit options correctly. Failure to do so may delay the processing of your assessment.

## Personal Details

Surname  Given Names

Address

POSTCODE

Business phone

Date of birth  /  /

TFN  Number of Dependant children

Email

Main Occupation

Private health insurance? Yes  No

If yes, please attach a copy of the 2011 tax statement issued by the fund

## Spouse or de facto spouse

Surname  Given Names  Spouse TFN

Date of birth  /  /  Taxable Income \$

If we do not complete your spouse's Income Tax Return, please complete the following:

- Reportable Fringe Benefits	\$ <input type="text"/>	- Net Financial Investment Loss	\$ <input type="text"/>
- Reportable Super Contributions	\$ <input type="text"/>	- Net Rental Property Loss	\$ <input type="text"/>
- Tax-Free Government Pensions	\$ <input type="text"/>	- Child Support Payments	\$ <input type="text"/>

## Income

**Government Benefits** Yes  No

Have you received any Job Search, Youth Allowance, or other Centrelink benefits?  
If yes, please attach Payment Summary from Centrelink.

**Dividends** Yes  No

Have you received any income from dividends?  
If yes, please include details or refer to <http://heffernancrawford.com.au/resources/worksheets> for a worksheet.

**Salary** Yes  No

Please attach tax return copy of PAYG Payment Summaries.  
Number of PAYG Payment Summaries

**Investments and Managed Funds** Yes  No

Have you received any income from Investment or Managed Funds?  
If yes, please attach the relevant annual tax statements.

**ETP** Yes  No

Have you received any Employment Termination Payments?  
If yes, please attach ETP Payment Summaries.

**Employee Share Schemes** Yes  No

Did you acquire shares under an Employment Share Acquisition Scheme? If yes, please provide details.

**Rent** Yes  No

Have you earned any income from rent?  
If yes, please refer to the attached Rental Property Schedule.

**Other income** Yes  No

Have you received any other income?  
If yes, please attach a brief description and show the amount. \$

**Partnerships and trusts** Yes  No

Have you received any income from trusts or partnerships?  
If yes, please attach Annual Taxation Statement from the Trust.

**Superannuation Benefits** Yes  No

Have you received a lump sum or income stream from a superannuation fund?  
If yes, please provide relevant payment summary.

## Capital gains

Have you sold any investments such as property or shares? Yes  No   
If yes, please include details such as the purchase and sale dates, as well as the purchase cost and sale proceeds.  
Please refer to <http://heffernancrawford.com.au/resources/worksheets> for a worksheet.

## Interest

Have you earned any income from interest on accounts in banks, credit unions or building societies?  
If it was earned on joint accounts, please show only your share of the interest.

Bank/Branch	Account No.	Interest (Your Share)	Withholding Tax Paid (If any)

\* If insufficient space please attach a list

## Deductions

### Motor Vehicle Expenses.

Yes  No

Have you used your motor vehicle for work-related travel?

Type of car

Engine capacity in litres (e.g. 3.2L)  L

Travel can be claimed for:

Tax agent visit/ongoing financial planning visits  Km

Regional meetings, in-service seminars, conferences  Km

School sports/camps\*  Km

School excursions  Km

Work experience  Km

Travel between split campus  Km

Other  Km

**Total Km**  Km

\* Note: you cannot claim for travel to and from work, nor for trips to check prospective school camp sites.

### Travel (Overseas &/or Interstate)

Yes  No

Have you undertaken any work-related travel overseas or interstate?

If yes, please attach a summary of details or refer to <http://heffernancrawford.com.au/resources/worksheets> for a worksheet.

### Clothing (Protective &/or Uniform)

Yes  No

Have you purchased protective clothing or uniforms for work?

*Note: sports clothing is not allowed.*

*Please provide full details of uniforms required to be worn.*

Protective clothing/uniforms (Please describe) \$

Protective footwear \$

Laundry & cleaning of protective clothing or uniforms \$

Sunscreen/sunhats/sunglasses \$

### Self Education

Yes  No

Have you carried out study related to current work at a recognised educational institution?

\*Note: HECS - HELP payments are not an allowable deduction.

If yes, please attach a summary or refer to <http://heffernancrawford.com.au/resources/worksheets> for a worksheet.

### Other Deductions

Yes  No

If there is anything else you can claim, please attach an itemised list and amount.

### Tax Agent

If we didn't prepare your tax return last year, please state the name of the tax agent and how much you paid for the service.

Name of tax agent

Fee \$

### Financial Planning

Yes  No

Professional fee paid for **ongoing** financial advice.

Name of adviser

Fees and any other relevant expenses \$

### Other Work Related Deductions

Yes  No

*If yes, please attach a list and an amount*

Expenses can be claimed for:

Additions to professional library \$

Excursion costs - accompanying students \$

Stationery, craft items, teaching aids \$

Tools & equipment (under \$300 per item) \$

Professional journals / magazines \$

Seminars, conferences & short courses \$

Professional Associations \$

Vic Institute of Teaching (VIT) \$

Union fees \$

Name of union:

### Telephone

Yes  No

Telephone (Landline)

Avg # of Calls  X  # of Wks (25c) \$

Telephone (Mobile)

Avg # of Calls  X  # of Wks (50c) \$

*Please only include business/work calls*

### Home Office Expenses

Yes  No

# of Hrs  X # of Wks  @ 26c \$

*The commissioner requires a diary to be completed stating the number of hours worked at home over a continuous 4 week period. The ATO has specified that 26 cents per hour is the appropriate rate for this claim. This amount includes the usage of electricity, gas and depreciation of home office furniture and fittings. For example if you work an average of 12 hours per week at home your claim for home office expenses could be \$150 (12 hours @ 26 cents per hour over 48 weeks).*

### Internet Service Provider Fees

Yes  No

\$  X  % (work usage) \$

### Charities

Yes  No

Have you made donations to registered charities or school building funds? Have you participated in a workplace giving program?

If yes, please attach itemised list and amount.

### Income Protection

Yes  No

Did you pay for Income Protection Insurance during the year?

If yes, how much? \$

## Rental Property

Taxpayer Owner/Joint Name

Address of Rental Property

  


POSTCODE

Acquired date

/
 /
 

Disposed date

/
 /
 

Current year rental dates

From /
 /
  To /
 /

Date property first became available for rent

Date /
 /

Number of weeks property was rented

List here your proportion of ownership

%

When was your Property Mortgage last reviewed?

Date /
 /

### Income (Show Total Figures)

Rent received

\$

Other rental related income

\$

### Expenses (Show Total Figures)

Interest on loans

\$

Special building write-offs\*

\$

Advertising for tenants

\$

Bank charges

\$

Body Corporate charges

\$

Borrowing expenses

\$

Cleaning

\$

Council rates

\$

Gardening/lawn mowing

\$

Insurance

\$

Land tax

\$

Legal fees

\$

Pest control

\$

Property agent fees/commission

\$

Repairs & maintenance

\$

Stationery, telephone & postage

\$

Travel (for inspections)

km

Water charges

\$

Sundry rental expenses

\$

**Total expenses**

\$

**Net rent**

\$

\* If you have obtained a Quantity Surveyors Report, please provide a copy of the report. Please note more copies of this schedule are available on our website.

### PAYG Instalments

Did you pre-pay any income tax by way of annual or quarterly PAYG instalments for the 2010/2011 financial year?

Yes  No

### HECS/HELP

Do you have a HECS/HELP debt?

Yes  No

Did you have a Fee HELP debt (please see our worksheet at [www.heffernancrawford.com.au](http://www.heffernancrawford.com.au))?"

Yes  No

If yes to both these questions, we will source the amount direct from the ATO.

### Depreciation

You may claim for depreciation on the cost of items and equipment purchased to be used as part of your work or rental property (including equipment used in your home office, less % private use). You need to base your statement of percentage of private use on a pattern of usage recorded in a diary for at least one month.

If we completed your tax return last year, you only need to show items purchased that cost more than \$300.

If you are a new client and you depreciated any items last year, please attach a copy of the depreciation schedule.

Equipment	Purchase price	Date purchased	% private use

## Tax Offsets

### Spouse rebate. (without dependant child or students)

Spouse's separate net income 01/07/10 – 30/06/11

\$

### Government Superannuation co-contribution

The ATO will automatically calculate the co-contribution you are eligible for, if you have made after tax contributions and fall within the relevant income ranges. They will automatically pay this amount into your superannuation fund after your tax return has been lodged.

Have you made an after tax contribution to super for the purpose of receiving the government Co-Contribution?

If yes, please state amount:

\$

### Superannuation Tax Offset for Spouse

If you made an eligible super contribution on behalf of your spouse, please include the details or refer to

<http://heffernancrawford.com.au/resources/worksheets> for a worksheet.

### Medical expenses

Add up the total cost of family doctor, hospital, physiotherapy, dental, optical, chemist and other medical services referred by your doctor.  
(Excluding ambulance subscriptions)

Does the total expenditure, after reimbursement by Medicare and your private health insurance fund, exceed \$2,000?

If yes, please state the total amount spent on medical expenses after reimbursement:

\$

### Child Support Payments

Did you make child support payments during the 2010/2011 financial year.

If yes, please state amount \$

## Education Tax Offset

As of the 1st of July 2008, the government has introduced the Education Tax Offset. This is a reimbursement to you of up to 50% of eligible education expenses incurred for each primary or secondary school student in your care.

For more information regarding eligibility and a list of eligible education expenses, please refer to the worksheet at <http://heffernancrawford.com.au/resources/worksheets>

Did you have children who were eligible for the education tax offset during the 2011 financial year? Yes  No

During the 2010/2011 year, were you eligible to receive FTB Part A? Yes  No

Child No	Eligible Primary School Expenses	Eligible Secondary Expenses

## We're interested in your views on other tax & business services

Lodging your tax return is only a small part of your Financial Management and Planning. It is far more effective that investors take Taxation into account as part of their overall financial plan.

If you would like to investigate your options in terms of improving your financial position, please complete this section of the questionnaire to help us understand what opportunities maybe available to you.

If you would like to further discuss any of the above we would be happy to arrange a no obligation consultation with ourselves and our financial planner.

What areas would you be interested in pursuing (tick one or more of the following):

- |                                                   |                                               |
|---------------------------------------------------|-----------------------------------------------|
| <input type="checkbox"/> Minimising tax           | <input type="checkbox"/> Self Managed Super   |
| <input type="checkbox"/> Tax effective Strategies | <input type="checkbox"/> Insurance needs      |
| <input type="checkbox"/> Creating wealth          | <input type="checkbox"/> Estate planning      |
| <input type="checkbox"/> Retirement Planning      | <input type="checkbox"/> Reducing Debt        |
| <input type="checkbox"/> Choosing investments     | <input type="checkbox"/> Reviewing Borrowings |

Other (please describe)

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