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## Defence Force Tax Return Form

A.B.N. 40 126 260 240

Client status: **New** or **Existing** (Please circle) Please fill all sections that apply to you or otherwise leave blank

How did you discover P.H.A.T. Returns? Defence News/Northern Courier/Infantry Mag/Website/Yellow pages/Friend name: \_\_\_\_\_

Number of PAYG summaries (group certificates): \_\_\_\_\_ **(please attach)**

Rank: \_\_\_\_\_ First Name: \_\_\_\_\_ Middle Name: \_\_\_\_\_ Surname: \_\_\_\_\_

Tax File Number: \_\_\_\_\_ Date of Birth: \_\_\_\_\_ Sex: M / F ADF: Army/Navy/Airforce

Job Type e.g. Rifleman, Marine Tech, Aircraft Mechanic, etc: \_\_\_\_\_ Base/Ship: \_\_\_\_\_

Home Address: \_\_\_\_\_ Email Address: \_\_\_\_\_

Landline Contact Number for booking: \_\_\_\_\_ Mobile: \_\_\_\_\_

Bank Account Details BSB: \_\_\_\_\_ Account number: \_\_\_\_\_ Name on account: \_\_\_\_\_

Are you married or de facto (lived with spouse for more than 6 months)? If yes, you must supply the ATO with details on your spouse as below:

Spouses Full Name: \_\_\_\_\_ Date of birth: \_\_\_\_\_ Spouses Taxable Income: \_\_\_\_\_

Is your Spouse also an ADF member? \_\_\_\_\_ Do you have any dependent children? If yes, how many? \_\_\_\_\_

How much interest did you earn on bank accounts? \_\_\_\_\_ Did you receive any dividends? \_\_\_\_\_

Do you have a managed fund? \_\_\_\_\_ If yes, please attach parts A, B and C from your fund statement

Did you trade shares? If so, attach all information regarding buying and selling of shares. Did you have a capital gain/loss? \_\_\_\_\_

Do you have a Higher Education Learning Programme (HELP) or Student Financial Supplement Scheme (SFSS) debt? If yes, how much: \_\_\_\_\_

Do you have Debts to Centrelink/Family Assistance Office/ATO? If yes, how much: \_\_\_\_\_

### Investment Property Information

Purchase date: \_\_\_\_\_ Purchase Price (less stamp duty): \_\_\_\_\_ Date first earned rental income: \_\_\_\_\_

Address of property: \_\_\_\_\_ Year of Construction: \_\_\_\_\_

Gross Rental Income: \_\_\_\_\_ Weeks rented: \_\_\_\_\_ Is this a shared rental? If so with whom: \_\_\_\_\_ Percentage split? \_\_\_\_\_

### **Rental Expenses**

Advertising: \_\_\_\_\_ Body Corporate: \_\_\_\_\_ Borrowing Fees: \_\_\_\_\_ Cleaning: \_\_\_\_\_ Council Rates: \_\_\_\_\_

Gardening: \_\_\_\_\_ Insurance: \_\_\_\_\_ Loan Interest: \_\_\_\_\_ Land Tax: \_\_\_\_\_ Legal Fees: \_\_\_\_\_

Property Agent Fees: \_\_\_\_\_ Repairs, maintenance: \_\_\_\_\_ Stationery/phone/postage: \_\_\_\_\_ Vehicle Expenses: \_\_\_\_\_

Travel Expenses: \_\_\_\_\_ Water Charges: \_\_\_\_\_ Other Rental Expenses: \_\_\_\_\_

**Please attach your depreciation schedule or does P.H.A.T. Returns have already? \_\_\_\_\_**

**If you don't have one, call Australian Tax Depreciation Services on 1300 557 342 a month before your booking**



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### Deductions

Only include items below if you have kept written evidence of purchase. Please only fax receipts for single purchases over \$300 e.g. Laptop \$1500 or Pack \$390, and if you are hoping to claim Motor Vehicle Expenses please send a copy of your registration or insurance papers for proof of ownership.

Date of Purchase	Item	Quantity	Total Amount	Proof of Purchase(s) kept (R=Receipt, B=Bank Statement, or O=Other)
	Uniform Purchases from the uniform shop on base(excluding razors, civilian suits)			
	Replacement Runners (Only if in SF unit, PTI or CFL )			
	PT gear (With registered ADF logo)			
	ADF team sporting clothing and footwear			
	Dry Cleaning of uniforms(not civilian clothing)			
	Medal Mounting			
	Watch(multi function)			
	Protective Eyewear			
	Pack			
	Swag			
	Sleeping Bag			
	Webbing			
	Pouches			
	Bivvy Bag			
	Dive Bag			
	Leatherman			
	Compass			
	Headlamp			
	Torch			
	Medkit			
	Knife			
	GPS			
	Camel Bak			
	Fitness Equipment (Only if in SF unit, PTI or CFL )			
	Gym Membership (Only if in SF unit, PTI or CFL )			
	Supplements (Only if in SF unit, PTI or CFL )			
	ADF team sporting equipment			
	Diving Gear			
	Laptop computer			
	Desktop computer			
	Mess fees (Only Senior non-commissioned officers and above)			
	Books purchased for professional development			
	Stationery			
	Other Items please supply list:			

**FAX (03) 8648 6821 OR EMAIL THIS FORM, PAYG SUMMARIES AND ATTACHMENTS**

**A MINIMUM OF 24 HOURS PRIOR TO YOUR BOOKING**