

Standard Tax Return Form

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? Friend/Website/Yellowpages/Other: _____

Number of PAYG Summaries (group certificates) including Centrelink : _____ **(please attach all)**

Title: _____ Name: _____ Middle Name: _____ Surname: _____

Tax File Number: _____ Date of Birth: _____

Job Type: _____ Employer: _____

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 your spouse for more than 6 months)? If yes, you must supply the ATO with details as below:

Spouses Full Name: _____ Date of Birth: _____ Spouses Taxable Income: _____

Do you have any dependents? If yes, how many? _____

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

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

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

Do you have private health insurance? _____ If yes, please attach statement from your fund

Do you have a Higher Education Learning Programme (HELP) debt? If yes, how much: _____

Do you have a Student Financial Supplement Scheme (SFSS) debt? If yes, how much: _____

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

Please fax or email this form, PAYG Summaries (Group Certificates), and receipts for any single purchases over \$300 e.g. Laptop \$1500. Also, if you are hoping to claim Motor Vehicle Expenses please send a copy of your registration or insurance papers for proof of ownership.

A MINIMUM OF 24 HOURS PRIOR TO YOUR BOOKING

F: (03) 8648-6821/ E: taxinfo@phatreturns.com.au