



This form is to help our Accountants complete your tax return, please complete this form to the best of your ability, ignoring the sections that do not apply to you. Please do not send all your receipts, store them safely for 5 years (from the date of assessment) to support your claim

Payment must be made prior to us starting your work.

We accept payments over the phone, payment by cheque or direct deposit into our account:

Account Name: Trilogy Tax

BSB: 124-192

Account: 22322657

Reference: 'Your Name'

Our reception can guide you on an estimate of fees.

Please call if you need further assistance on 07 5499 9973 or email admin@trilogytax.com.au

Regards,

Trilogy Tax

Accountants

15 Bunya street, Maleny QLD 4552
PO Box 808, Maleny QLD 4552
Ph (07) 5499 9973

BJ & LJ Enterprises PTY LTD
ABN 58604 723 346

Tax Return for the Financial Year ending 30th June 20__ (Please Specify)

Personal Details			
Full Name			
Street Address			
DOB		TFN	
Email Address			
Phone Number		Occupation	

Banking Details	
BSB	
Account Number	
Account Name	

Private Health		
Fund Name		
Fund Membership Number		
Private Hospital Cover	Yes	No

Spouse Details		
Did you have a spouse for the whole financial year?	Yes	No
If part of the year, please supply the dates (Start and End dates)		
Spouse Full Name		
Spouse DOB		
Spouses Taxable income for the Financial Year		

Dependent Children	
Number of Dependent Children	
Child Support paid	

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Income

	Yes / No	Details (if required)
ABN Income (See Page 4, 7 & 8)		
Wages		
PAYG Payment Summaries / Income Statements		
Termination / Lump Sum PAYG Summaries (e.g. Redundancy or Long Service Leave)		
Government Payments (e.g. Pension, Newstart Allowance, Sickness Benefit)		
Bank Interest earned		
Dividend Statements for shares including Tax Summary statements for Managed funds and Employee Share Scheme		
Income earned under an Australian Business Number (ABN), Trust or companies		
Foreign Income		
Capital Gains – Contact Office		
Investment Property (See Page 6)		

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Deductions

Motor Vehicle – Cents per Kilometre method or Logbook method

Note: You cannot claim 5,000km's plus actual expenses on your vehicle E.g. Registration, insurance, repairs & maintenance & depreciation. You must choose one method only according to the records kept during the financial year.

If you use your own car in performing your work-related duties (including a car you lease or hire), you may be able to claim a deduction for car expenses.

If the travel was partly private, you can claim only the work-related portion.

Please refer to the ATO website for further information <https://www.ato.gov.au/individuals/income-and-deductions/deductions-you-can-claim/vehicle-and-travel-expenses/car-expenses/>

Motor Vehicle Details

Make/ Model/ Year/ Value

You can choose one of the following two methods to calculate deductions for car expenses:

1. Cents Per Kilometre method

Total work Km's Travelled (up to 5000km's)

Parking

\$

Tolls

\$

2. Logbook Method

Is your Logbook current?

Yes

No

Business Use

%

Fuel Cost

\$

Tolls

\$

Registration

\$

Parking

\$

Insurance

\$

Loan Interest

\$

Repairs and Maintenance

\$

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Other Work-Related deductions

Work related uniforms can be claimed if they are of a protective nature, has a company logo attached or are occupation specific eg. Chefs uniforms. Jeans and cotton drill shirts, shorts and trousers are not designed to protect you from the risk of illness or injury in the workplace. You cannot claim the cost of purchasing or cleaning plain uniforms or clothes, such as black trousers, white shirts, suits or stockings, even if your employer requires you to wear them.

Flights	\$
Overnight Meals	\$
Overnight Accommodation	\$
Transfers	\$
Excess Baggage	\$
Protective Clothing or Logo Uniform	\$
Protective Footwear (Non Slip / Steel Cap Boots)	\$
Sun Protection	\$
Tools and/or Equipment	\$
Union or Professional Memberships	\$
Printing and Stationery	\$
Home Office hours	\$
Mobile Phone Expense (Amount and Business / Private %)	\$
Internet Expense (Amount and Business / Private %)	\$
Gifts and/or Donations for Registered charities	\$
Cost of Managing Tax Affairs	\$
Income Protection Insurance	\$
Other (please specify):	\$
Other (please specify):	\$

Work related self Education Expenses

You may be able to claim a deduction for self-education expenses if your self-education relates to your current work activities as an employee. You cannot claim a deduction for self-education expenses for a course that does not have a enough connection to your current work activities.

Name of Training Course	
Institute	
Cost	\$

The ATO have three basic requirements for claiming work-related deductions:

- Proof of Payment
- Necessary for earning Assessable income
- Your Employer required you spend the money

Any failure to satisfy any of these three requirements could result in audit of Tax Returns, paying back refunds and/or Heavy Penalties and interest.

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Investment Property

An Investment Property is a property that you **do not** live in but you own, and tenants pay you rent weekly

One page per investment property please

Address of the Property		
Number of weeks the property was available for rent		
Do you own the property 100% in your name?	Yes	No
If no, what is your share of the property?	%	
Please Attached the end of Financial year statement from your Real Estate Agent/s (if applicable)		
Income		
Gross Rental Income Received	\$	
Other (please specify, e.g. Reimbursements):	\$	
Expenses		
Body Corporate Fees	\$	
Cleaning	\$	
Council Rates	\$	
Gardening / Lawn Mowing	\$	
Insurances (Building and / or Landlord)	\$	
Interest Charged on Loan	\$	
Legal Fees	\$	
Pest Control	\$	
Real Estate Agent Fees	\$	
Repairs and Maintenance (over \$300, please provide receipts)	\$	
Smoke Alarms	\$	
Water Rates	\$	
Other (please specify):	\$	
Other (please specify):	\$	
Other (please specify):	\$	
Other (please specify):	\$	

Have you sold this property? Please talk to the Accountants about a Capital Gains schedule, further fees apply, and further information will be required.

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ABN Income & Expense's

ABN Number:		
Are you GST registered?	Yes	No
Did you receive 80% or more of income from the one source?	Yes	No
Occupation:		
Income		
ABN Income Received	\$	
Farm Cattle Sales	\$	
Other income (Please specify)	\$	
Expenses		
Consumables	\$	
Contractors	\$	
Insurance (Please Specify)	\$	
Insurance (Please Specify)	\$	
Insurance (Please Specify)	\$	
Materials & Supplies	\$	
Memberships / Licences	\$	
Superannuation (Personal, confirmation from super company needed)	\$	
Superannuation (Staff)	\$	
Telephone	\$	
Tools & Equipment	\$	
Wages	\$	
Other (Please Specify)	\$	
Other (Please Specify)	\$	
Farm Cattle Purchases	\$	
Farm Cattle Selling Expenses	\$	
Farm Feed	\$	
Farm Insurance	\$	
Farm Machinery Cost (Per Vehicle)	\$	
Farm Machinery Cost (Per Vehicle)	\$	
Farm Machinery Cost (Per Vehicle)	\$	
Farm Power	\$	
Farm Rates	\$	
Farm Repairs and Maintenance	\$	
Farm Telephone	\$	
Farm Vet Costs	\$	
Other (Please Specify)	\$	
Other (Please Specify)	\$	

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Cattle Stock Numbers	
Opening Stock from 30 June 2019:	
Less: Cattle Sold	
Less: Killed for personal use	
Less: Death or Missing	
Plus: Natural Increase	
Plus: Purchases	
Closing Stock Number at 30 June 2020:	

The Expenses and Income are an example of categories for claims and are a guide only. Please any extra info specific to your Industry use the extra lines below:

Other Expenses	
Other (Please Specify)	\$
Other (Please Specify)	\$
Other (Please Specify)	\$
Other (Please Specify)	\$
Other (Please Specify)	\$
Other (Please Specify)	\$
Other (Please Specify)	\$
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