



ABN: 83 006 649 412  
 2A Station St, Seaford, Vic 3198  
 Postal: P.O Box 19, Seaford, Vic 3198  
 Telephone: (03) 8770 6600

## Individual Income Tax Return Teleservice form

Tax File Number \_\_\_\_\_ Client Name.....

Address.....

Occupation..... DOB.....

Daytime Phone..... Mobile.....

Email address.....

**Tax Refunds** – the Tax Office no longer issues refunds by cheque so you must advise us your bank account details.

BSB: \_\_\_\_\_ Account Number: \_\_\_\_\_  
 Account Name: \_\_\_\_\_

❖ **Note 1: \$140 on preparing a standard tax return through teleservice. (Price down from \$160 )**

❖ **Invoicing**

I hereby authorize fee for preparation of my tax return. I understand that an invoice will be Issued separately for any additional work undertaken.

**VISA / MASTERCARD / AMERICAN EXPRESS**

Name of cardholder.....Credit card number.....  
 Expiry date.....CVV.....  
 SIGNATURE OF CARDHOLDER.....

**OR**

**Direct deposit to: Taxlink Pty Ltd**

BSB: 063 106

Account No#: 1006 5120

Please supply invoice number or name when using bank deposit.

❖ **Note 2:** Please send your form with your supporting documents as requested below back to our office via:

**MAIL:** P.O Box 19 Seaford VIC 3198 OR **EMAIL:** [tax@taxlink.com.au](mailto:tax@taxlink.com.au) as we cannot be sure when the Australian Tax Office Portal will have these details available.

To make sure we are able to do have your return completed and back to you as soon as possible, assure that all paperwork for your return is attached to this form. If you require any more forms from our office (ie, Rental statement, Motor Vehicle statement) please don't hesitate to contact our office on (03) 8770 6600 or request a form via email [tax@taxlink.com.au](mailto:tax@taxlink.com.au) or check our website: [www.taxlink.com.au](http://www.taxlink.com.au)

**Please use this checklist to confirm what need to be attached**

## Income

1. Payment Summaries

Number of jobs for the year:

2. Lump Sum and Termination Payment Summaries
3. Government payment statements, if received
4. Interest income from banks and building societies
5. Dividend statements for dividends received or reinvested
6. Annual Tax Statements from Managed Funds

*Other income:*

7. Rental properties (please contact us and fill in our **Rental statement – Website**)
8. Business (please contact us)
9. Foreign income
10. Capital gains (please contact us)

*If you sell any assets such as shares or property please attach copy of statements/buy & sell contracts – See Website*

11. Employee share schemes

### **Offsets and Refunds**

12. **Health insurance and rebate entitlement statement**
13. IAS statements or details of PAYG instalments paid
14. Spouse details (Name, DOB, Income) including taxable and exempt income

Name:

DOB:

Income:

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### **Superannuation**

Did you pay funds to superannuation over Super Guarantee? If YES:

Super Fund Name:

Acct Number:

Amount:

## DEDUCTIONS

| Work-related Expenses |   | Have you kept the receipts?  |
|-----------------------|---|--|
| <b>D1</b>             | <p><b>Motor vehicle</b></p> <p>If you use your own car for business / work purposes through the year but <b>Not for travel to &amp; from work.</b></p> <p>Please contact us and fill in our Motor Vehicle statement if you keep a <b>car logbook. If not</b>, please advise us how many kilometres you would have travelled for work (allowable claim maximum 5000 km).</p> <p><b>*Please complete M/V schedule</b> .....</p> |  |
| <b>D2</b>             | <p><b>Work-related travel expense</b></p> <p>Tolls</p> <p>Washes</p> <p>Parking</p> <p>Other</p>  | <p><b>Amount</b></p> <p>\$</p> <p>\$</p> <p>\$</p> <p>\$</p> <p>Yes/No</p> <p>Yes/No</p> <p>Yes/No</p> <p>Yes/No</p>   |
| <b>D3</b>             | <p><b>Work-related uniform, protective clothing, and laundry</b></p> <p>Laundry – Number of washes per week _____</p> <p>Clothing</p> <p>Other</p>  | <p><b>Amount</b></p> <p>\$</p> <p>\$</p> <p>\$</p> <p>Yes/No</p> <p>Yes/No</p> <p>Yes/No</p>   |
| <b>D4</b>             | <p><b>Work-related self-education expense and description of how it relates to your work</b></p> <p>Name of course #1 &amp; description</p> <p>Name of course #2 &amp; description</p> <p>Name of course #3 &amp; description</p> <p>Other fees</p>   | <p><b>Amount</b></p> <p>\$</p> <p>\$</p> <p>\$</p> <p>\$</p> <p>Yes/No</p> <p>Yes/No</p> <p>Yes/No</p> <p>Yes/No</p>   |
| <b>D5</b>             | <p><b>Other work-related expenses</b></p> <p>Computer</p> <p>Conference</p> <p>Home office (Number of hours working at home per week)</p> <p>Income protection insurance</p> <p>Internet</p> <p>Meals</p> <p>Memberships</p> <p>Mobile (Work %) * See Notes on Website</p> <p>Outdoors</p> <p>Seminar</p> <p>Stationery</p> <p>Subscription</p> <p>Tools</p> <p>Union</p> <p>Other</p>  | <p><b>Amount</b></p> <p>\$</p> <p>\$</p> <p>hrs/wk</p> <p>\$</p> <p>\$</p> <p>\$</p> <p>\$</p> <p>\$</p> <p>\$</p> <p>\$</p> <p>\$</p> <p>\$</p> <p>\$</p> <p>\$</p> <p>\$</p> <p>Yes/No</p> <p>Yes/No</p> <p>Yes/No</p> <p>Yes/No</p> <p>Yes/No</p> <p>Yes/No</p> <p>Yes/No</p> <p>Yes/No</p> <p>Yes/No</p> <p>Yes/No</p> <p>Yes/No</p> <p>Yes/No</p> <p>Yes/No</p> |
| <b>D9</b>             | <b>Gifts or Donations (Receipts Needed)</b>   | \$ Yes/No  |
| <b>D10</b>            | <b>Cost of managing tax affairs</b>   | \$ Yes/No  |