



DIGITAL TAX RETURN
Also available on our website: www.rapport-tax.com.au



SURNAME: _____ GIVEN NAMES: _____

DATE OF BIRTH: _____ TAX FILE NUMBER (TFN): _____

HOME ADDRESS: _____

POSTAL ADDRESS: _____

PHONE H: _____ B: _____ M: _____

EMAIL ADDRESS: _____

Would you like to receive a copy of your tax return/ tax estimate by email? YES NO

OCCUPATION: _____

I authorise Rapport Taxation Services to electronically transmit my 2016 tax return. My signature below, together with my agreement on completion of the return, confirms all the information in the return, including the supplement to the income tax return and schedules (if applicable) is true and correct. I have shown all my income for tax purposes, including net capital gains, from sources in and out of Australia for the year of income. I have all the necessary receipts and/or records to support my claim.

I declare that:

- the information provided to Rapport Taxation Services for the preparation of this tax return is true and correct and
- Rapport Taxation Services is authorised to give the document to the Commission of Taxation.

SIGNED: _____ DATED: _____

PAYMENT METHODS

Please tick one of the boxes below.

I have attached my cheque (Please consult Rapport on 02-95800030 for fee) _____

I authorise you to debit my credit/debit card (details below) _____

I authorise fee from refund payment _____

(Note: **FFR charge of \$15, terms and conditions apply**)

SIGNED: _____ DATED: _____

I wish to pay by Amex/MasterCard/Visa (Circle type of card)

Name on Card: _____

Card number: _____ / _____ / _____ / _____ Expiry date: ____/____

Attach your document(s) and forward them to us at Reply Paid 718, Hurstville BC NSW 1481, or by email to rapptaxadmin@rapport-tax.com.au

*****DISCLAIMER*****

Liability limited by a scheme approved under Professional Standards Legislation

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Checklist

Did you have the following

Y N

(Please tick and attach details where necessary. You can also write a summary if it's easier)

1. All PAYG Payment Summary (or Group Certificate) (if applicable) Y N
2. Interest income (if applicable) Y N
3. Dividends income (if applicable) Y N
4. Shares or Options received under Employee Share Scheme (if applicable, please provide ESS statement from your employer) Y N
5. Foreign income including foreign employment income & tax-free foreign income (if applicable) Y N
6. Trust/managed funds distribution (if applicable, please provide **Annual Tax Statements** from your managed funds) Y N
7. Tax deductible charitable donations (if applicable) Y N
8. Student loans HECS/HELP and or SFSS (if applicable) Y N
9. Private health fund cover (if applicable)
Does your health fund private hospital cover cover your whole family? Y N
10. Capital gains/losses in the financial year
If applicable, please provide details of assets disposed of, date of purchase and cost, date of disposal and proceeds and any incidental costs Y N
11. Rental property or properties in the financial year Y N
If you have a new rental property during the financial year, please advise:
 - a. Full address of the property
 - b. Date property first rented out
 - c. Property ownership detailsIn broad terms, the information required to prepare your tax return rental property schedule is:
 - a. rental income received to 30 June
 - b. rental expenses incurred/paid to 30 June:
 - advertising for tenants
 - body corporate fees/strata levies
 - cleaning
 - council rates
 - gardening/lawn mowing
 - landlord and or building insurance
 - interest charged on this property mortgage
 - land tax
 - pest control
 - property agent's commission and fees (will show on their statement)
 - repairs and maintenance
 - travel expenses for property inspection
 - water rates
 - depreciation expenses from a depreciation reportIf you use a property agent to manage your rental property, a yearly rental statement from your agent will contain most of the information required.
12. A spouse Y N
If yes, your spouse details (full name, date of birth and income) unless we also prepare your spouse's tax return.
13. Dependent children. If so, how many ____ Y N