FMW ACCOUNTANTS PTY LIMITED

INCOME TAX RETURN DATA COLLECTION SHEET YEAR ENDED 30 JUNE 2024



Title			
SURNAME:			
First Name:		Date:	
Middle Name[s]:			
Date of Birth:			
Tax File Number:		•	
Address [Street]:			
-	State	Postcode	
Do you own this property? If so:	Market Value: \$	Loan: \$	
Are you thinking of purchasing a ls your interest rate the best avail	nother property for rental or owner occupied or renovating?		
Have you considered fixing your			
	is correct and you are claiming the maximum interest deduc	ctions?	
**Would you like our Mortga	ge Consultant to contact you for a FREE review of	your loans?	
Address [Postal]:			
	State	Postcode	
Mobile:			
-			
E-mail:			
	we will send you an invitation to join the FMW Document Hu	ib – please look out for this email to	set up
Is this your first year as a cl			
If YES - Please advise us on	how you heard about us.		
Occupation:			
Do you have a copy of last y	rear's tax return [For new clients only]		
If YES - Please provide			
•	Ethical letter to your previous accountant -		
	countants Name & Address -		
Accountant:			
Address:	Postco	ode:	
-	. 65.66		
Disease musciple community in the	and Details IATO does not and out the		
Please provide your Bank A Account Name:	ccount Details [ATO does not send out cheques any	ymorėj	
BSB: [6 Digits]	A/c No:		
[9]			

How many Jobs have you had during the year?
Did you receive Centrelink Payments during the year?

Please write no.

Please provide Income Statement [they should be in your mygov] & ETP Statements for each as well as Employee Share Scheme summaries/statements if applicable

Г	Account 1	Account 2	Account 3	Account 4	Account 5
Bank:					
SSB:					
Account Number:					
nterest Amount: \$					
oint Y/N					
Have you received any Divid If YES - Please provide d [if joint show 100% of div	letails and attach	relevant docum			
Company Name	SRN / HIN	Date Paid	Unfranked Amount	Franked Amount	Imputation Cred
FYES - Please provide d rlease provide Tax Distribut Other:					
-					
			Amount		
nterest Financial Planning Fees			\$ Amount \$ \$		- -
nterest Financial Planning Fees Investment Courses			\$		- - -
nterest Financial Planning Fees nvestment Courses Other			\$ \$ \$ \$ \$		- - - -
Expenses Interest Financial Planning Fees Investment Courses Other Have you sold any Shares, C	• •	d/or Property during	\$ \$ \$ \$ \$		- - -
nterest Financial Planning Fees nvestment Courses Other Have you sold any Shares, C You may have a Capital Gai	in or Loss]		\$ \$ \$ g the year?		- - - -
nterest Financial Planning Fees nvestment Courses Other Have you sold any Shares, C You may have a Capital Gai	in or Loss] I capital loss from p	previous year? Y/N	\$ \$ \$ g the year?		
nterest Financial Planning Fees nvestment Courses Other Have you sold any Shares, C You may have a Capital Gai Do you have a carry forward f YES - Please provide d	in or Loss] I capital loss from p	previous year? Y/N	\$ \$ \$ g the year?	Sale	\$ Sale
nterest Financial Planning Fees nvestment Courses Other Have you sold any Shares, C You may have a Capital Gai	in or Loss] I capital loss from p	previous year? Y/N relevant docum	\$ \$ \$ g the year? if Yes write amount ents	Sale Date	1
nterest Financial Planning Fees Investment Courses Other Have you sold any Shares, C You may have a Capital Gai Do you have a carry forward If YES - Please provide d	in or Loss] I capital loss from p	previous year? Y/N relevant docum Purchase	\$ \$ \$ g the year? if Yes write amount ents Purchase		Sale
nterest Financial Planning Fees nvestment Courses Other Have you sold any Shares, C You may have a Capital Gai Do you have a carry forward f YES - Please provide d	in or Loss] I capital loss from p	previous year? Y/N relevant docum Purchase	\$ \$ \$ g the year? if Yes write amount ents Purchase		Sale
nterest Financial Planning Fees nvestment Courses Other Have you sold any Shares, C You may have a Capital Gai Do you have a carry forward f YES - Please provide d	in or Loss] I capital loss from p	previous year? Y/N relevant docum Purchase	\$ \$ \$ g the year? if Yes write amount ents Purchase		Sale
nterest Financial Planning Fees nvestment Courses Other Have you sold any Shares, C You may have a Capital Gai Do you have a carry forward f YES - Please provide d	in or Loss] I capital loss from p	previous year? Y/N relevant docum Purchase	\$ \$ \$ g the year? if Yes write amount ents Purchase		Sale
nterest Financial Planning Fees nvestment Courses Other Have you sold any Shares, C You may have a Capital Gai Do you have a carry forward f YES - Please provide d	in or Loss] I capital loss from p	previous year? Y/N relevant docum Purchase	\$ \$ \$ g the year? if Yes write amount ents Purchase		Sale
nterest Financial Planning Fees nvestment Courses Other Have you sold any Shares, C You may have a Capital Gai Do you have a carry forward If YES - Please provide d	in or Loss] I capital loss from p	previous year? Y/N relevant docum Purchase	\$ \$ \$ g the year? if Yes write amount ents Purchase		Sale
nterest Financial Planning Fees nvestment Courses Other Have you sold any Shares, C You may have a Capital Gai Do you have a carry forward f YES - Please provide d	in or Loss] I capital loss from p	previous year? Y/N relevant docum Purchase	\$ \$ \$ g the year? if Yes write amount ents Purchase		Sale
nterest Financial Planning Fees nvestment Courses Other Have you sold any Shares, C You may have a Capital Gai Do you have a carry forward f YES - Please provide d	in or Loss] I capital loss from p	previous year? Y/N relevant docum Purchase	\$ \$ \$ g the year? if Yes write amount ents Purchase		Sale
Interest Financial Planning Fees Investment Courses Other Have you sold any Shares, C You may have a Capital Gai Do you have a carry forward	in or Loss] I capital loss from p	previous year? Y/N relevant docum Purchase	\$ \$ \$ g the year? if Yes write amount ents Purchase		Sale
Interest Financial Planning Fees Investment Courses Other Have you sold any Shares, C You may have a Capital Gai Do you have a carry forward	in or Loss] I capital loss from p	previous year? Y/N relevant docum Purchase	\$ \$ \$ g the year? if Yes write amount ents Purchase		Sale
Interest Financial Planning Fees Investment Courses Other Have you sold any Shares, C You may have a Capital Gai Do you have a carry forward	in or Loss] I capital loss from p	previous year? Y/N relevant docum Purchase	\$ \$ \$ g the year? if Yes write amount ents Purchase		Sale
nterest Financial Planning Fees nvestment Courses Other Have you sold any Shares, C You may have a Capital Gai Do you have a carry forward If YES - Please provide d	in or Loss] I capital loss from p	previous year? Y/N relevant docum Purchase	\$ \$ \$ g the year? if Yes write amount ents Purchase		Sale

Have you received any Interest income during the year?

For CryptoCurrency - please provide full year tax report by downloading it in PDF and excel format.

21 Do you have a Rental Property?

If YES - Please provide details [if joint show 100% of rent & expenses, and mark accordingly]

Would you like our Mortgage Consultant to contact you for a review of your loans?

Rental Property 1	
Address of Property:	
	Postcode:
Cost of property: \$	Date of purchase:
Date first became available for rent:	
Year property built:	Percentage owned:
Is this property registered for Land Tax	
If NO - Please provide Approximate LAND VALUE ONLY	\$
Amount outstanding on bank loan	\$
Approximate market value of the property	\$
Rental Property 2	
Address of Property:	
	Postcode:
Cost of property: \$	Date of purchase:
Date first became available for rent:	
Year property built:	Percentage owned:
Is this property registered for Land Tax	
If NO - Please provide Approximate LAND VALUE ONLY	\$
Amount outstanding on bank loan	\$
Approximate market value of the property	\$
Rental Property 3	
Address of Property:	
	Postcode:
Cost of property: \$	Date of purchase:
Date first became available for rent:	
Year property built:	Percentage owned:
Is this property registered for Land Tax	
If NO - Please provide Approximate LAND VALUE ONLY	\$
Amount outstanding on bank loan	\$
Approximate market value of the property	\$

Can you claim depreciation on your rental properties?

NOTE: Income tax deductions for the decline in value of previously used plant and equipment in rental premises used for residential accommodation are no longer allowed.

The changes apply from 1 July 2017 to:

- => Previously used plant and equipment acquired at or after 7.30 pm on 9 May 2017 unless it was acquired under a contract entered into before this time
- => Plant and equipment acquired before 1 July 2017 but not used to earn income in either the current or previous year.

Rental expenses you cannot claim

Rental Expenses you can claim
Property Depreciation Link

Income and Expenses from properties

		_	Property 1 \$	Property 2 \$	Property 3 \$
	Rent Received for the year [Gros	ss]			
	Expenses:				
	Interest				
	Bank fees				
	Council Rates				
	Water Rates				
	Agents Commission				
	Strata levies				
*		*Please provide breakdown below)			
	Insurance	· · · · · · · · · · · · · · · · · · ·			
	Borrowing costs				
	Land Tax				
	Gardening/Lawn Mowing				
	Other: Please detail				
	Other: Please detail				
	Other: Please detail				
	Other. Flease detail	L			
		announced that from 1 July 2017 all or a rental property will be disallowe \$3001:		elating to inspecting,	
	Access a democrat [Creater than				
	Please provide Asset[s] Descript	tion Cost & Date of Purchase			
	Date	Asset De	scription		Cost
				<u> </u>	
	LL				
*	repairs a maintenance	pairs and maintenance expense items:			
	Date	IA-			Cost
	Date	Ite	em		Cost

^{*} Note: if the repairs were done before the property rented out, it cannot claim as deduction. TR 97/23

Did you use your car for						
If YES - Provide details	Car Expenses Link					
Make of Motor Vehicle:						
Model of Motor Vehicle:	-					
Registration Number:						
Set Rate for 5000KM [ma	- <u>-</u>					
Cost of Car	\$	Date of purchase	1	1		
If traded in for new car: 1	Trade in amount :		\$			
-	our Motor Vehicle claim? / IE AND WORK IS GENERA				MPLETED]	
Did you Keep a log book	for the year? [Must have	peen kept for a 12 week p	eriod]			
If YES - Please provide		E	Business	%:		_
AND please provide F	ULL amount and we wi	Il adjust for the busine	ess %			
Fuel				\$		
Repairs & maintenance						
Registration						
•						
Insurance		1-11				
	se provide documents for his	s ciaim]		\$		_
Car Wash				\$		_
Interest on loan [please pr	ovide loan statements]			\$		_
If NO LOGBOOK, bu	ıt use your car for work pu	rposes, please provide				
NO. OF KM's TRAVELLE	D (max of 5,000 k's)			Kn	n's Travelled:	:
Did you incur any Work I	any business rela Related Travel Expenses d letails uses relate to your income	uring the year?			<u>D2 - D15</u> *	
Did you incur any Work I If YES - Please provide d Explain how these exper	Related Travel Expenses d	uring the year?				
Did you incur any Work I If YES - Please provide d Explain how these exper	Related Travel Expenses d	uring the year?		\$		
Did you incur any Work I If YES - Please provide d Explain how these exper Taxi Tolls	Related Travel Expenses d	uring the year?		\$ \$		
Did you incur any Work I If YES - Please provide d Explain how these exper	Related Travel Expenses d	uring the year?		\$ \$		
Did you incur any Work I If YES - Please provide d Explain how these exper Taxi Tolls	Related Travel Expenses d	uring the year?		\$ \$		
Did you incur any Work I If YES - Please provide of Explain how these exper Taxi Tolls Car Parking Other What evidence do you have	Related Travel Expenses d letails uses relate to your income	uring the year?		\$ \$		
Did you incur any Work I If YES - Please provide d Explain how these exper Taxi Tolls Car Parking Other What evidence do you have	Related Travel Expenses d letails nses relate to your income	uring the year?		\$ \$		
Did you incur any Work I If YES - Please provide of Explain how these exper Taxi Tolls Car Parking Other What evidence do you hav NOTE: TRAVEL BET	Related Travel Expenses d letails uses relate to your income	uring the year?	TIBLE	\$ \$ \$		- - - -
Did you incur any Work I If YES - Please provide of Explain how these exper Taxi Tolls Car Parking Other What evidence do you hav NOTE: TRAVEL BET Exceptions: Travelling between	Related Travel Expenses d letails uses relate to your income	uring the year? DRK IS NON-DEDUCT to be claimed as a tax deduction	TIBLE	\$\$ \$\$ \$the travel is a		- - - -
Did you incur any Work I If YES - Please provide of Explain how these exper Taxi Tolls Car Parking Other What evidence do you hav NOTE: TRAVEL BET Exceptions: Travelling between transportation of "heavy or but Did you have expenses f If YES - Please provide of	Related Travel Expenses details uses relate to your income ve? [invoice, g/cert, diary etc. WEEN HOME AND Won home and work in certain cases ulky goods/equipment", or where a	DRK IS NON-DEDUC [*] to be claimed as a tax deductio	TIBLE ons, where to "place of	\$\$ \$\$ \$the travel is a		- - - -
Did you incur any Work I If YES - Please provide of Explain how these exper Taxi Tolls Car Parking Other What evidence do you hav NOTE: TRAVEL BET Exceptions: Travelling between transportation of "heavy or but Did you have expenses f If YES - Please provide of	Related Travel Expenses details asses relate to your income over [invoice, g/cert, diary etc. WEEN HOME AND Work in certain cases alky goods/equipment", or where the core work Related Uniforms/	DRK IS NON-DEDUC [*] to be claimed as a tax deductio	TIBLE ons, where to "place of	\$\$ \$\$ \$the travel is a		- - - -
Did you incur any Work I If YES - Please provide of Explain how these exper Taxi Tolls Car Parking Other What evidence do you hav NOTE: TRAVEL BET Exceptions: Travelling between transportation of "heavy or but Did you have expenses f If YES - Please provide of Explain how these exper	Related Travel Expenses details uses relate to your income ve? [invoice, g/cert, diary etc. WEEN HOME AND Won home and work in certain cases ulky goods/equipment", or where a	DRK IS NON-DEDUCT to be claimed as a tax deduction a taxpayer's home qualifies as a	TIBLE ons, where to "place of	\$\$ \$\$ \$the travel is a		- - - -
Did you incur any Work I If YES - Please provide of Explain how these exper Taxi Tolls Car Parking Other What evidence do you hav NOTE: TRAVEL BET Exceptions: Travelling between transportation of "heavy or but Did you have expenses f If YES - Please provide of Explain how these exper	Related Travel Expenses details uses relate to your income ve? [invoice, g/cert, diary etc. WEEN HOME AND Won home and work in certain cases ulky goods/equipment", or where and work Related Uniforms/	DRK IS NON-DEDUCT to be claimed as a tax deduction a taxpayer's home qualifies as a	TIBLE ons, where to "place of	\$\$ \$\$ the travel is a business".	ttributable to the	- - - -
Did you incur any Work I If YES - Please provide of Explain how these exper Taxi Tolls Car Parking Other What evidence do you hav NOTE: TRAVEL BET Exceptions: Travelling between transportation of "heavy or but Did you have expenses f If YES - Please provide of Explain how these exper	Related Travel Expenses details uses relate to your income ve? [invoice, g/cert, diary etc. WEEN HOME AND Won home and work in certain cases ulky goods/equipment", or where and work Related Uniforms/ letails uses relate to your income	DRK IS NON-DEDUCT to be claimed as a tax deduction a taxpayer's home qualifies as a	TIBLE ons, where to "place of	\$\$ \$\$ the travel is a business".	ttributable to the	
Did you incur any Work I If YES - Please provide of Explain how these exper Taxi Tolls Car Parking Other What evidence do you hav NOTE: TRAVEL BET Exceptions: Travelling between transportation of "heavy or but Did you have expenses f If YES - Please provide of Explain how these exper MUST BE PROTECTIVE/OC Clothing/Uniform Laundry of uniform/protect	Related Travel Expenses details uses relate to your income ve? [invoice, g/cert, diary etc. WEEN HOME AND Won home and work in certain cases ulky goods/equipment", or where and work Related Uniforms/ letails uses relate to your income	DRK IS NON-DEDUCTO to be claimed as a tax deduction a taxpayer's home qualifies as a Laundry during the year?	TIBLE ons, where to "place of	\$\$ \$\$ the travel is a business".	ttributable to the	
Did you incur any Work I If YES - Please provide of Explain how these exper Taxi Tolls Car Parking Other What evidence do you hav NOTE: TRAVEL BET Exceptions: Travelling between transportation of "heavy or but Did you have expenses f If YES - Please provide of Explain how these exper MUST BE PROTECTIVE/OC Clothing/Uniform Laundry of uniform/protect	Related Travel Expenses details uses relate to your income ve? [invoice, g/cert, diary etc. WEEN HOME AND We use home and work in certain cases ulky goods/equipment", or where a for Work Related Uniforms/ letails uses relate to your income OCCUPATION-SPECIFIC/A	DRK IS NON-DEDUCTO to be claimed as a tax deduction a taxpayer's home qualifies as a Laundry during the year?	TIBLE ons, where to "place of	\$\$ \$\$ the travel is a business".	ttributable to the	
Did you incur any Work I If YES - Please provide of Explain how these exper Taxi Tolls Car Parking Other What evidence do you hav NOTE: TRAVEL BET Exceptions: Travelling between transportation of "heavy or but Did you have expenses f If YES - Please provide of Explain how these exper MUST BE PROTECTIVE/O Clothing/Uniform Laundry of uniform/protect What evidence do you have	Related Travel Expenses details uses relate to your income ve? [invoice, g/cert, diary etc. WEEN HOME AND We use home and work in certain cases ulky goods/equipment", or where a for Work Related Uniforms/ letails uses relate to your income OCCUPATION-SPECIFIC/A	DRK IS NON-DEDUCTO to be claimed as a tax deduction a taxpayer's home qualifies as a Laundry during the year?	TIBLE ons, where of	\$\$ \$\$ the travel is a business".	ttributable to the	
Did you incur any Work I If YES - Please provide of Explain how these exper Taxi Tolls Car Parking Other What evidence do you hav NOTE: TRAVEL BET Exceptions: Travelling between transportation of "heavy or but Did you have expenses f If YES - Please provide of Explain how these exper MUST BE PROTECTIVE/O Clothing/Uniform Laundry of uniform/protect What evidence do you have Did you have expenses f	Related Travel Expenses details uses relate to your income ve? [invoice, g/cert, diary etc. WEEN HOME AND Worder home and work in certain cases alky goods/equipment", or where all the ses relate to your income OCCUPATION-SPECIFIC/Autive clothing use? [invoice, g/cert, diary etc. for Work Related Self-Eduction of the sel	DRK IS NON-DEDUCTORE IS	TIBLE ons, where of	\$\$ \$\$ the travel is a business".	ttributable to the	
Did you incur any Work I If YES - Please provide of Explain how these exper Taxi Tolls Car Parking Other What evidence do you hav NOTE: TRAVEL BET Exceptions: Travelling between transportation of "heavy or but Did you have expenses f If YES - Please provide of Explain how these exper MUST BE PROTECTIVE/OC Clothing/Uniform Laundry of uniform/protect What evidence do you have Did you have expenses f Seminars during the year	Related Travel Expenses details uses relate to your income ve? [invoice, g/cert, diary etc. WEEN HOME AND Worder in home and work in certain cases alky goods/equipment", or where a significant is seen relate to your income OCCUPATION-SPECIFIC/Active clothing ve? [invoice, g/cert, diary etc.]	DRK IS NON-DEDUCTORE IS	TIBLE ons, where of	\$\$ \$\$ the travel is a business".	ttributable to the	
Did you incur any Work I If YES - Please provide of Explain how these exper Taxi Tolls Car Parking Other What evidence do you hav NOTE: TRAVEL BET Exceptions: Travelling between transportation of "heavy or but Did you have expenses f If YES - Please provide of Explain how these exper MUST BE PROTECTIVE/O Clothing/Uniform Laundry of uniform/protect What evidence do you hav Did you have expenses f Seminars during the yea Self Education Expenses Link	Related Travel Expenses details ases relate to your income ve? [invoice, g/cert, diary etc. WEEN HOME AND Won home and work in certain cases alky goods/equipment", or where a for Work Related Uniforms/ letails ases relate to your income OCCUPATION-SPECIFIC/A tive clothing ve? [invoice, g/cert, diary etc. for Work Related Self-Educ. for Work Related Self-Educ. for Work Related Self-Educ. for Work Related Self-Educ.	DRK IS NON-DEDUCT to be claimed as a tax deduction a taxpayer's home qualifies as a Laundry during the year? TO REGISTERED ation/ Training/ Conference click Link for info	TIBLE ns, where in the place of the place o	\$\$ \$\$ the travel is a business".	ttributable to the	
Did you incur any Work I If YES - Please provide of Explain how these exper Taxi Tolls Car Parking Other What evidence do you hav NOTE: TRAVEL BET Exceptions: Travelling between transportation of "heavy or but Did you have expenses f If YES - Please provide of Explain how these exper MUST BE PROTECTIVE/O Clothing/Uniform Laundry of uniform/protect What evidence do you hav Did you have expenses f Seminars during the yea Self Education Expenses Link Explain how these expens	Related Travel Expenses details uses relate to your income ve? [invoice, g/cert, diary etc. WEEN HOME AND Worder home and work in certain cases alky goods/equipment", or where all the ses relate to your income OCCUPATION-SPECIFIC/Autive clothing use? [invoice, g/cert, diary etc. for Work Related Self-Eduction of the sel	DRK IS NON-DEDUCT to be claimed as a tax deduction a taxpayer's home qualifies as a Laundry during the year? TO REGISTERED ation/ Training/ Conference click Link for info	TIBLE ns, where in the place of the place o	\$s s s s	ttributable to the	
Did you incur any Work I If YES - Please provide of Explain how these exper Taxi Tolls Car Parking Other What evidence do you hav NOTE: TRAVEL BET Exceptions: Travelling between transportation of "heavy or but Did you have expenses f If YES - Please provide of Explain how these exper MUST BE PROTECTIVE/O Clothing/Uniform Laundry of uniform/protect What evidence do you hav Did you have expenses f Seminars during the yea Self Education Expenses Link	Related Travel Expenses details ases relate to your income ve? [invoice, g/cert, diary etc. WEEN HOME AND Won home and work in certain cases alky goods/equipment", or where a for Work Related Uniforms/ letails ases relate to your income OCCUPATION-SPECIFIC/A tive clothing ve? [invoice, g/cert, diary etc. for Work Related Self-Educ. for Work Related Self-Educ. for Work Related Self-Educ. for Work Related Self-Educ.	DRK IS NON-DEDUCT to be claimed as a tax deduction a taxpayer's home qualifies as a Laundry during the year? TO REGISTERED ation/ Training/ Conference click Link for info	TIBLE ns, where in the place of the place o	\$\$ \$\$ the travel is a business".	ttributable to the	

or to open up a new income-earning activity.

	enses as an <u>EMPLOYEE</u> during the yeaven 100% of expense we will adjust for prive		
Briefcase		\$	
Computer supplies			
Professional Association fees/Union fees	S	\$	New: Please note the ATO has introduced a
Tools		\$	new "safe harbour" for
Newspapers/Magazines/Journals/Books		\$	a maximum claim of
Stationery		\$	\$50 for phone expenses. if you use phone for your work
Software [if <\$300, otherwise depreciated	d list asset helowl	\$	phone for your work and the expense is
Other -			"incidental", the ATO
Other -			
Other -		\$	on the following rates:
Home office - running expens	<u>es</u>		
	ur (includes phone, mobile,internet, e	electricity, gas	and stationery)
** Actual cost method - you must inc	RD SHOULD BE BASED on actual tot ur additional running expesnes and have running expenses if other members	e kept a records	or written evidence
	as you while you are working from h		ora (mio aro not not ming
ATO apportionment guidelines	Enter work related %		Enter full amount
Internet		%	\$
Mobile		%	\$
Telephone		%	\$
Electricity		%	\$
Computer consuables (i.e. ink, printer)		%	\$
Stationery		%	\$
	rs etc] - Cost and date of purchase require	u e	
** To be eligible, a.) the area is clear	enses giuble to claim occupancy expenses rly identifiable as a PLACE OF BUSIN being used for private purpose d.) are Enter work related % based on floor a	a is used regul	
Mortgate interest		%	\$
Rent		%	\$
Council rates		%	\$
Water rates		%	\$
Land Tax			\$
House insurance		%	\$
What evidence do you have? [invoice, g/ *** WARNING: claiming occupancy e	[/] cert, diary etc] <mark>xpenses on your main residence, your ma</mark>	in residence exen	nption will be affected
/D8 Did you have expenses relating to Inte	erest and Dividends received during the ye	ar?	
Interest re: borrowings for shares etc		\$	
Other -		\$	
What evidence do you have? [invoice, g/	/cert, diary etc]	_	

Did you make any Donations during the year?

If YES - Please provide details [NOTE: cannot claim if you stand to benefit e.g. Raffle tickets, dinners etc] Must be a registered charity to claim a tax deduction

Charity Name	Amount
School Building Fund	
School Library Fund	

If YES - Please provide amount New: for taxpayers claimed motor vehicle expenses by the cents per kilometre method, these kilometres should be included in the 5,000 business kilometre limit already. Did you make any Personal Superannuation Contribution and provide your fund a notice of intent to claim as deduction and receive an acknowledgement from the Fund? If YES - Please provide amount and copy of Amount \$	
Did you make any Personal Superannuation Contribution and provide your fund a notice of intent to claim as deduction and receive an acknowledgement from the Fund?	
Did you make any Personal Superannuation Contribution and provide your fund a notice of intent to claim as deduction and receive an acknowledgement from the Fund?	
intent to claim as deduction and receive an acknowledgement from the Fund?	
intent to claim as deduction and receive an acknowledgement from the Fund?	
•	
acknowledgement from the Fund	
acknowledgement from the Fund	
For Div 293 estimate, how much superannuation paid for the year	
Please provide amount \$	
Other deductions - Income protection insurance	
If YES - Please provide amount \$	
WARNING: income protection inside your superannaution fund is not deductbile	
[You are not covered if only have Ancillary cover] Spouse's Full Name: Spouse Date of Birth:	
•	
Spouse's Income:	
Do you have any adult dependants?	
Do you have dependant child/children?	
Are you a dependent shild covered on a perente policy?	
Are you a dependant child covered on a parents policy?	
Do you or your spouse pay Child Support?	
Do jou or jour opouso pay orina oupport:	
If Yes, please provide amount paid in Tax Year.	
If Yes, please provide amount paid in Tax Year.	nformation:
If Yes, please provide amount paid in Tax Year. If no private health insurance [hospital cover], then surcharge will apply depends on your income and age.	information:
If Yes, please provide amount paid in Tax Year. If no private health insurance [hospital cover], then surcharge will apply depends on your income and age. Rebate for Health Insurance is income tested against the MLS income tier thresholds, please see following links for more in	information:
If Yes, please provide amount paid in Tax Year. If no private health insurance [hospital cover], then surcharge will apply depends on your income and age. Rebate for Health Insurance is income tested against the MLS income tier thresholds, please see following links for more in	information:

Phone: 0: Street/Postal: Le FMW Contact Details - Vic Phone: 0: Street/Postal: Le FMW Contact Details - Qu Phone: 0: Postal Postal Street: S	Amount Am	g at 30 June of \$	ECTLY related	Date: Date: Date: Date: Date: Date:		
FMW Contact Details - Vice Phone: Street/Postal: Lef FMW Contact Details - Que Phone: Street/Postal: Street/Postal	Amount Am	g at 30 June of \$	ECTLY related	Date: Date: Date: Date: Date: Date:	IT income proc	
Please explain how the above activities in order to be claimed by the contact Details - New Phone: Street/Postal: EMW Contact Details - Vice Phone: Street/Postal: CFMW Contact Details - Que Phone: Street/Postal: CFMW Contact Details - Que Phone: Street/Postal: S	Amount Am	\$	ECTLY related	Date: Date: Date: Date: Date: Date:	IT income proc	
Please explain how the above activities in order to be claimed activities ac	Amount 2023 to 30 Jun Amount Amount Amount Amount Amount One Life expended: w South Wall 2 8425 7888 evel 1, Suite 3, storia Office 3 9490 5666	\$	ECTLY related	Date: Date: Date: Date: Date:	IT income proc	
Please explain how the above activities in order to be claimed by the second se	Amount Amount Amount Amount Amount Amount Amount Amount One Life expended: W South Wal 2 8425 7888 evel 1, Suite 3, storia Office 3 9490 5666	sssenses are DIRE	ECTLY related	Date: Date: Date: Date: Date:	IT income proc	
Please explain how the above activities in order to be claims FMW Contact Details - Net Phone: 02 Street/Postal: Lo Phone: 03 Street/Postal: Lo Phone: 05 Street/Postal: Lo Phone: 05 Street/Postal: Lo Street/Postal: Lo	Amount Amount Amount Amount Amount One Life expended: w South Wall 2 8425 7888 evel 1, Suite 3, storia Office 3 9490 5666	\$\$ \$\$ \$\$ enses are DIRE	ECTLY related	Date: Date: Date: Date: Date:	IT income proc	
Please explain how the above activities in order to be claims FMW Contact Details - Net Phone: 02 Street/Postal: Lo Phone: 03 Street/Postal: Lo Phone: 05 Street/Postal: Lo Phone: 05 Street/Postal: Lo Street/Postal: Lo	Amount Amount Amount Amount Amount One Life expended: w South Wall 2 8425 7888 evel 1, Suite 3, storia Office 3 9490 5666	\$\$ \$\$ \$\$ enses are DIRE	ECTLY related	Date: Date: Date: Date: Date:	IT income proc	
Please explain how the above activities in order to be claims FMW Contact Details - Never Phone: 02 Street/Postal: Love Phone: 03 Street/Postal: Love Phone: 05 FMW Contact Details - Que Phone: 05 Phone: 05 FMW Contact Details - Que Phone: 05 FMW Contact Details - Street: Street: Street: Street: Street	Amount Amount Amount Amount One Life expended: W South Wall 2 8425 7888 evel 1, Suite 3, storia Office 3 9490 5666	\$\$ \$\$ enses are DIRE	ECTLY related	Date: Date: Date: Date: Date:	IT income proc	
Please explain how the above activities in order to be claimed activities activities activities in order to be claimed activities in order to be claimed activities activities activities activities in order to be claimed activities act	Amount Amount Amount One Life expected: W South Wall 2 8425 7888 evel 1, Suite 3, storia Office 3 9490 5666	\$\$ \$enses are DIRE	ECTLY related	Date: Date: Date: Date:	IT income proc	
Please explain how the above activities in order to be claimed activities and activities activities in order to be claimed activities and activities	Amount Amount One Life expeed: w South Wal 2 8425 7888 evel 1, Suite 3, storia Office 3 9490 5666	\$enses are DIRE	ECTLY related	Date: Date: Date:		ducing
FMW Contact Details - Net Phone: 0: Street/Postal: Le Phone: 0: Street/Postal: Le FMW Contact Details - Vic Phone: 0: Street/Postal: Le FMW Contact Details - Qu Phone: 0: Postal Postal Pi Street: S	Amount One Life expended: w South Wall 2 8425 7888 evel 1, Suite 3, ttoria Office 3 9490 5666	es Office	ECTLY related	Date:		ducing
FMW Contact Details - Net Phone: 02 Street/Postal: Le FMW Contact Details - Vic Phone: 03 Street/Postal: Le FMW Contact Details - Qu Phone: 05 Street/Postal: Le FMW Contact Details - Qu Phone: 05 Phone: 05 Phone: 05 Phone: 05 Postal Pe Street: S	w South Wal 2 8425 7888 evel 1, Suite 3, ttoria Office 3 9490 5666	es Office				ducing
FMW Contact Details - Net Phone: 0: Street/Postal: Le Phone: 0: Street/Postal: Le FMW Contact Details - Vic Phone: 0: Street/Postal: Le FMW Contact Details - Qu Phone: 0: Postal Postal Pi Street: S	w South Wal 2 8425 7888 evel 1, Suite 3, ttoria Office 3 9490 5666	es Office				aucing
FMW Contact Details - Net Phone: 02 Street/Postal: Le Phone: 03 Street/Postal: Le FMW Contact Details - Qu Phone: 03 Phone: 05 Postal Pi Street: S	w South Wal 2 8425 7888 evel 1, Suite 3, ttoria Office 3 9490 5666	es Office			65	
Phone: 0: Street/Postal: Lo FMW Contact Details - Vic Phone: 0: Street/Postal: Lo FMW Contact Details - Qu Phone: 0: Phone: 0: Postal Postal Street: S	2 8425 7888 evel 1, Suite 3, etoria Office 3 9490 5666		by Road, Cro	ws Nest NSW 206	65	
Phone: 0: Street/Postal: Lo FMW Contact Details - Vic Phone: 0: Street/Postal: Lo FMW Contact Details - Qu Phone: 0: Phone: 0: Postal Postal Street: S	2 8425 7888 evel 1, Suite 3, etoria Office 3 9490 5666		by Road, Cro	ws Nest NSW 206	65	
Phone: 0: Street/Postal: Lo FMW Contact Details - Vic Phone: 0: Street/Postal: Lo FMW Contact Details - Qu Phone: 0: Phone: 0: Postal Postal Street: S	2 8425 7888 evel 1, Suite 3, etoria Office 3 9490 5666		by Road, Cro	ws Nest NSW 206	65	
Phone: 0: Street/Postal: Lo FMW Contact Details - Vic Phone: 0: Street/Postal: Lo FMW Contact Details - Qu Phone: 0: Phone: 0: Postal Postal Street: S	2 8425 7888 evel 1, Suite 3, etoria Office 3 9490 5666		by Road, Cro	ws Nest NSW 206	65	
Phone: 0: Street/Postal: Lo FMW Contact Details - Vic Phone: 0: Street/Postal: Lo FMW Contact Details - Qu Phone: 0: Phone: 0: Postal Postal Street: S	2 8425 7888 evel 1, Suite 3, etoria Office 3 9490 5666		by Road, Cro	ws Nest NSW 206	55	
Phone: 0: Street/Postal: Le FMW Contact Details - Vic Phone: 0: Street/Postal: Le FMW Contact Details - Qu Phone: 0: Postal Postal Street: S	2 8425 7888 evel 1, Suite 3, etoria Office 3 9490 5666		by Road, Cro	ws Nest NSW 206	55	
Phone: 0: Street/Postal: Le FMW Contact Details - Vic Phone: 0: Street/Postal: Le FMW Contact Details - Qu Phone: 0: Postal Postal Street: S	2 8425 7888 evel 1, Suite 3, etoria Office 3 9490 5666		by Road, Cro	ws Nest NSW 206	65	
Street/Postal: Lo FMW Contact Details - Vic Phone: 03 Street/Postal: Lo FMW Contact Details - Qu Phone: 05 Postal Postal Street: S	2 8425 7888 evel 1, Suite 3, etoria Office 3 9490 5666		by Road, Cro	ws Nest NSW 206	65	
Phone: 0: Street/Postal: Lo FMW Contact Details - Vic Phone: 0: Street/Postal: Lo FMW Contact Details - Qu Phone: 0: Postal Postal Street: S	2 8425 7888 evel 1, Suite 3, etoria Office 3 9490 5666		by Road, Cro	ws Nest NSW 206	65	
Phone: 0: Street/Postal: Le FMW Contact Details - Vic Phone: 0: Street/Postal: Le FMW Contact Details - Qu Phone: 0: Postal Postal Street: S	2 8425 7888 evel 1, Suite 3, etoria Office 3 9490 5666		by Road, Cro	ws Nest NSW 206	65	
Street/Postal: Lo FMW Contact Details - Vic Phone: 03 Street/Postal: Lo FMW Contact Details - Qu Phone: 05 Phone: 05 Postal Postal Street: S	evel 1, Suite 3, storia Office 3 9490 5666	, 174 Willoughl	by Road, Cro	ws Nest NSW 206	65	
FMW Contact Details - Vice Phone: 0: Street/Postal: Lo FMW Contact Details - Qu Phone: 0: Postal Postal Street: Se	toria Office 3 9490 5666	, 174 Willoughl	by Road, Cro	ws Nest NSW 206	65	
Phone: 03 Street/Postal: Lo FMW Contact Details - Qu Phone: 05 Postal Postal Street: S	3 9490 5666					
Phone: 03 Street/Postal: Lo FMW Contact Details - Qu Phone: 05 Postal Postal Street: S	3 9490 5666					
Street/Postal: Lo FMW Contact Details - Qu Phone: 0: Postal Pi Street: S						
FMW Contact Details - Qu Phone: 0: Postal P Street: S	aval 1 Quita 6	A EO Ilppor Ha	oidalbara Bas	nd Ivanhoo VIC 2	070	
Phone: 07 Postal P Street: S	ever i, Suite 6/	A, 50 Opper ne	eldelberg Roa	ad, Ivanhoe, VIC 3	079	
Postal P Street: S		<u>fice</u>				
Street: S	7 5531 4009					
		ustralia Fair, C				
F il.	carborough Ce	entre, Level 1,	Suite 106, 89	Scarborough Str	eet, Southport	Qld 4215
Email: ad	dmin@fmw.co	m.au			www.fmw.co	m.au
Notes/Other relevant infor	mation:					
ivotes/outer relevant intor	mauon.					

Did you operate a business activity during the year as a SOLE TRADER/CONTRACTOR?

If YES - Please provide details	SOLE MADERIOON MAGTOR		
DO NOT COMPLETE IF A COMPANY/TRUST/PARTNERSH	IID - contact us for more infor	mation required	
Number of Business Activities	mr - contact us for more infor	mation required	
Business Name:			
ABN:			
Business Activity 1:			
Business Activity 2:			
Business Activity 3:			
DO NOT INCLUDE GST IN THESE AMOUNTS IF YOU HAV	E LODGED A BAS CLAIMING	GST PAID/RECEIVE	ט
In a series	Duning at 4	Dunings 0	D i
Income:	Business 1	Business 2	Business 3
Sales/Fees etc.	\$	\$	\$
Job keeper payment received;	\$	\$	\$
Cash boost received	\$	\$	\$
State government business grant received	\$	\$	\$
Other	\$	\$	\$
Expenses:	Г.	1.	1.
Accounting fees	\$	\$	\$
Advertising	\$	\$	\$
Bank fees	\$	\$	\$
Computer supplies [Please provide business use %'age]	\$	\$	\$
Home Office Running Expenses	\$	\$	\$
Internet fees [Please provide business use %'age]	\$	\$	\$
Motor vehicle [refer to Motor Vehicle Above- D1]	\$	\$	\$
Printing & stationery	\$	\$	\$
Rent [Please provide business use %'age]	\$	\$	\$
Subscriptions	\$	\$	\$
Telephone - home [Please provide business use %'age]	\$	\$	\$
Telephone - mobile [Please provide business use %'age]	\$	\$	\$
Training Courses	\$	\$	\$
Travel & accommodation	\$	\$	\$
Superannuation	\$	\$	\$
Other	\$	\$	\$
Other	\$	\$	\$
Other	\$	\$	\$
Other	\$	\$	\$
Other	\$	\$	\$
	L¥	1,	1.*
Stock on hand at 30 June:	\$	\$	\$
	L .	17	17
Depreciable Business Assets purchased THIS FINANCIAL	L YEAR		
Item:	Date:	\$	
Item:	Date:	\$	
Item:	Date:	\$	<u> </u>
		*	_
Notes:			
1101001			



Please note - This sheet is intended to act as a guide and to prompt you to provide additional information where required to assist us in preparing your tax return. It is NOT intended to actually calculate your estimated income tax payable/[refund].

Completion of this sheet does not reduce your usual substantiation and record-keeping requirements.