

**If your in a rush try our new  
drop off express tax.**

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**Client Details**

Full Name \_\_\_\_\_

Address \_\_\_\_\_

Suburb \_\_\_\_\_ State \_\_\_\_\_ Postcode \_\_\_\_\_

Email \_\_\_\_\_

Telephone \_\_\_\_\_ W | H\_ Mobile \_\_\_\_\_

Number of Dependent Children \_\_\_\_\_ Do you have Private Health \_Y\_|\_N\_

How did you hear about Choice ? \_\_\_\_\_

**Preferred Contact Details** (if we have any queries)

Telephone  
 Telephone     Mobile     \_\_\_\_\_

Other Contact  
 Email     TXT Message     \_\_\_\_\_

**Additional Information for NEW CLIENTS**

Tax File Number | \_ | \_ | \_ | \_ | \_ | \_ | \_ | \_ | \_ |

Date of Birth | \_ | \_ / \_ | \_ / \_ | \_ | \_ | \_ | \_ | DD / MM / YYYY

Sex    \_ M \_ F \_

Previous Accountant \_\_\_\_\_

Have you included a copy of Last Years Tax Return    Y | N

**Client Declaration**

I hereby declare all information is true and correct to the best of my knowledge and I understand my tax return will be completed from the information provided.

I hereby engage Choice Corporate Pty Ltd T/As Tax Choice to prepare my taxation return and any other relevant supporting schedules in accordance with the appropriate standards. In consideration for this engagement I authorize Tax Choice to deduct their fees from their trust account, from either my refund or any other monies paid owing to me into this account. Furthermore I authorize that my details may be revealed in an audit of the Tax Choice trust account.

Client Authorized Signature \_\_\_\_\_

If you wish your refund to be transferred directly to your bank account please provide

**BSB** \_ | \_ | \_ | \_ | \_ | \_    **ACCOUNT** \_ | \_ | \_ | \_ | \_ | \_ | \_ | \_ | \_ | \_ | \_ | \_ |

**Office Use Only**

- |                                             |                                               |                                         |
|---------------------------------------------|-----------------------------------------------|-----------------------------------------|
| <input type="checkbox"/> Pre Filling Report | <input type="checkbox"/> Client Advised Ready | <input type="checkbox"/> Bank Account   |
| <input type="checkbox"/> Deduct Authority   | <input type="checkbox"/> Payment Pre Lodgment | <input type="checkbox"/> Job flow Batch |

**Starting a Business?**  
Ask Us How we can Help

**Your Home Loan?**  
Ask Us How we can Help

**Tax Planning?**  
Ask Us How we can Help

**Income protection?**  
Ask Us How we can Help

## If your in a rush try our new drop off express tax.

Whether you want to use our new drop off express tax, or see us for a complete consultation we will require the following information to assist in getting you, your maximum entitled refund, simply follow the check list below.

# Your 2011 tax return check list

<p><b>PAYG &amp; Salary Tax Return</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> PAYG Summaries from your employer</li> <li><input type="checkbox"/> Early Termination Payment Summary</li> <li><input type="checkbox"/> PAYG Summary for Government Assistance (NewStart, Pension, AusStudy, Drought Relief)</li> </ul> <p><b>Work Related Expenses</b></p> <p><b>Work Related Car Expenses</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Car Log Book and Work Kilometres Traveled</li> <li><input type="checkbox"/> Expense Receipts for Car Travel &amp; % Used</li> </ul> <p><b>Work Related Travel Expenses</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Receipts for Travel &amp; Accommodation</li> <li><input type="checkbox"/> Expense Diary for Travel &amp; Accommodation</li> <li><input type="checkbox"/> Number of Nights stayed away for work</li> </ul> <p><b>Laundry &amp; Protective Clothing</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Laundry &amp; Cleaning Expenses for Work wear</li> <li><input type="checkbox"/> Protective Clothing</li> <li><input type="checkbox"/> Work Specific Clothing and Uniform</li> </ul> <p><b>Work Related Self Education Expenses</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Protective Clothing</li> <li><input type="checkbox"/> Work Specific Clothing and Uniform</li> </ul> <p><b>Other Work Related Expenses</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Union Fees</li> <li><input type="checkbox"/> Work Tools &amp; Equipment</li> <li><input type="checkbox"/> Home Office Work Expenses</li> <li><input type="checkbox"/> Work Requisites / Mobile Phone</li> <li><input type="checkbox"/> Sun Protection, Sunglasses, Hats, Sun Wear</li> <li><input type="checkbox"/> All Other Expenses</li> </ul>	<p><b>If you have dependent children</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Number and age of dependent children</li> <li><input type="checkbox"/> Medical Expenses (out of pocket)</li> <li><input type="checkbox"/> Include, doctors, dentists, optometrist</li> </ul> <p><b>Please note the ATO no longer processes yearly family tax benefit payments as these are now directly paid by centrelink. Please contact centrelink on 13 61 50</b></p> <p><b>Education Tax Refund (for eligible children)</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Expenses, for Laptops &amp; Home Computers</li> <li><input type="checkbox"/> Expenses, Computer related equipment</li> <li><input type="checkbox"/> Expenses, Internet Connections</li> <li><input type="checkbox"/> Expenses, Textbooks and paperbased school learning materials, study guides and trade tools</li> </ul> <p><b>Please note school fees, uniforms, transport and other fees cannot be claimed under the education rebate.</b></p> <p><b>If you have private health insurance</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Provide a list of medical expenses over \$1500</li> <li><input type="checkbox"/> Provide your year end taxation summary</li> </ul> <p><b>If you have received Interest Payments</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Provide a summary of accounts &amp; Interest</li> <li><input type="checkbox"/> Include any term deposits and summary</li> </ul> <p><b>If you have managed funds/investments</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Managed Fund Tax Summary</li> <li><input type="checkbox"/> Investment Purchase/Sale contract and all associated expenses/sales to the investment</li> <li><input type="checkbox"/> Information on any other Capital Gain Event</li> </ul>
<p><b>Interest and Dividend deductions</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Interest Deductions</li> <li><input type="checkbox"/> Managed Fund deduction costs</li> </ul> <p><b>Gifts or Donations</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Donations and Receipts \$_____</li> </ul> <p><b>Cost of Managing Tax Affairs</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Accountancy Fees for 2008 \$_____</li> <li><input type="checkbox"/> ATO Imposed General Interest Charges</li> </ul> <p><b>Medical Expenses</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Medical Expense receipts over \$1500.00</li> </ul> <p><b>Income Protection Costs</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Cost of Income Protection for Year</li> </ul>	<p><b>If you have shares &amp; Dividends</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Provide Dividend Statements</li> <li><input type="checkbox"/> Share sales, provide purchase costs and original share price and sale notes including costs</li> </ul> <p><b>If you have an investment property</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Rental Summary Statement from Agent</li> <li><input type="checkbox"/> Expenses, All Repairs &amp; Maintanance</li> <li><input type="checkbox"/> Expenses, Travel &amp; Accomodation to Investment</li> <li><input type="checkbox"/> Expenses, Rates, Insurance, Water, All Expenses</li> <li><input type="checkbox"/> Loan Statement from bank.</li> <li><input type="checkbox"/> If sold provide contract of sale/purchase for the acquisition or sale of the property</li> </ul>