

info@safrata.com.au

+61 411 540 275

INDIVIDUAL TAX RETURN INFORMATION FORM

PERSONAL INFORMATION

I hereby provide my consent to Safra Tax & Accounts to be registered as a client on the ATO Tax Agent Portal and access the information available therein

First Name

Surname

Date of Birth

Day

Mth

Year

Current Residential Address

Post Code

Tax File Number

Phone Number

E-mail address

Date of arrival in Australia

Country of residence immediately before arriving

Time spent in that country

Years

Months

Permanent resident / citizen?

Yes

No

Have you applied for permanent residency?

Yes

No

Date Application Lodged

Which visa did you hold in the financial year?
(list all if more than one)

Bank Account

Number

BSB

Bank Account Name

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INCOME DEDUCTIONS / DETAILS

Occupation

Financial year this form relates to

Type of Income Earned

Employment Income (PAYG)

Bank interest

Dividends

Capital gain (sale of shares or CGT asset)

Rental income

Sole trader / ABN type of income

Sale of cryptocurrencies

Work Related Expenses

Car / taxi / public

Laptop / computer

Mobile phone

Internet

Home office

Professional memberships

Donations / education / courses

Loan interest

Laundry / uniform

Stationery

other

Private Health Insurance

Yes

No

Married / DeFacto partner

Yes

No

First name of Partner

Last name of partner

Partner's Date of Birth

Taxable Income in the financial year

Other comments you wish to add