

### Income

Did you have any Salary, Wages or Allowances?  
Did you have an Employment Termination Payment (ETP)?  
Did you have an Australian Government Allowance or Pension?  
Did you have Superannuation or an Australian Pension or Annuity?  
Did you have Attributed Personal Services Income?

Did you receive any interest?  
Dividends?  
Did you receive any dividends / franking credits?  
Do you have any managed funds?

Other Partnership and Trust Income:

Details of other amounts	Name of the Partnership or Trust	Amount of distribution (\$)	Amount of Franking Credits (\$)	Amount of TFN Withholding Tax (\$)	Any other amounts (\$)
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Personal Services Income?  
Did you receive any Personal Services Income?  
Did you receive any Business Income?  
Did you make a capital gain or loss this year?  
Did you receive any foreign source income?  
Do you have a rental property?  
Do you have a second rental property?  
Do you have a third rental property?  
Did you receive any other Income?

### Work Related Deductions

Did you use your car for any work related purpose?  
Did you have any travel expenses?  
Did you have any uniform, protective clothing or laundry expenses?  
Did you have any self education expenses?  
Did you have any other work related expenses?

### Other Deductions

Did you purchase any assets for your work or other income earning activities?  
Did you have any expenses related to your dividends and interest?  
Did you make any gifts or donations to a deductible gift recipient?  
Did you have a Deductible Amount of Undeducted Purchase Price (UPP) of an Australian pension or annuity?  
Did you have any costs to manage your taxation affairs?  
Did you have any tax losses from earlier years?  
Did you make any personal superannuation contributions?  
Did you have any other deductions?

### Tax Offsets (Rebates)

Did you have Private Health Insurance, and have not claimed the 30% premium reduction during the year?  
Are you entitled to the Ongoing Baby Bonus?  
Did you make any superannuation contributions on behalf of your spouse?  
Did you live or work in a remote area during the year, apart from your current address?  
Did you serve overseas as a member of the Australian Defence Force or UN armed force?  
Did you have Net Medical Expenses of greater than \$1500, for you and your dependants?  
Did you maintain your parent, spouse's parent or an invalid relative?  
Are you entitled to any other tax offsets?

### Spouse/Defacto Details

Name; DOB; Period, period together; Separate income?

### Other Details

Do you have a HECS or HELP debt?  
Do you have a SFSS debt?  
Did you make any PAYG Instalments to the Tax office during the year?  
Did you have any dependant children or students during the year?  
Are you entitled to receive a reduction or exemption from the Medicare Levy?  
Did you have Private Health Insurance during the year?  
Did you receive an amount of trust income that has had Family Trust Distributions Tax paid on it?

**Contact** A My Tax Zone consultant will contact you regarding questions and completion.

### Other information or queries?

Attach certificates and notes where necessary.

#### Forward by:

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