

My ITWV Direct

Declaration - Authority - Consent

APPOINTMENT OF TAX AGENT/ELECTRONIC LODGEMENT DELCLARATION (INDIVIDUAL AND/OR NON-INDIVIDUAL)

I hereby appoint Elyon Enterprises Pty Ltd (Trading as the agent, My Tax Zone) and authorise the agent to act as my tax agent, and to lodge my tax return/s and or ITWV applications electronically or otherwise. I have willingly supplied my Tax File Numbers. I acknowledge that once my returns/s and or ITWV application is lodged the subsequent time taken is in no way the responsibility of the agent.

DECLARATION

I declare that all information supplied in the ITWV worksheet is true and correct to the best of my ability, and any error in supplying information is solely mine. I have estimated all income expected to be received in accordance with the requirements of the Australian Taxation Office (ATO). This includes income projections from an employer, Centrelink, business, capital gains, interest, dividends, rental receipts and any share of income from joint investments. All interest received including from Savings Banks, Fixed Deposits, Credit Unions, Building Societies and Personal Loans has been included in the ITWV worksheet even if tax has already been deducted. All company dividends received and any distributions from Managed Fund/Trusts is included. I confirm that any Award Transport Allowance received has been included as income and any deduction in regard to this complies with S8(1) of the Tax Act.

SUBSTANTIATION

I have available all the necessary documentary evidence to substantiate all projected deductions to be claimed in the Taxation Return this ITWV application relates to and can make them available if required by the ATO.

FINANCIAL PRODUCT ADVICE

Further I acknowledge it is possible that the taxation advice received from the agent may also constitute "financial product advice" within the meaning of that term in Chapter 7 of the Corporations Act 2001. The agent has advised me that the agent is not licensed to provide financial product advice and tax is only one of the matters that must be considered when making a decision on a financial product. The agent has advised that I should consider taking advice from the holder of an Australian Financial Services License before making a decision on a financial product. The fact the agent is required under the Corporations Act to provide this warning does not in any way affect the agent's ability to provide taxation advice and in particular, the specific tax advice that may have been received in any tax matters and all other related matters.

ELYON ENTERPRISES PTY LTD T/AS My Tax Zone PRIVACY STATEMENT

Under the Privacy Act, you usually have a right to access personal information that we collect upon request. The information we are collecting is for the purpose of providing taxation, accounting and other related advice. We may also use it to send you information (delete where not applicable)

1. To send newsletters concerning various financial matters which we believe would be of interest to you;
2. To invite you to seminars or events; and
3. To inform you of developments at the agent and other services that we can provide.

This information may be disclosed to the following organisations(delete as not applicable) Australian Taxation Office, Our solicitors; related companies or affiliate practices which may receive information of this kind; or to any other organisations to which we usually disclose information of this kind.

CONSENT CLAUSE

I acknowledge that I have read the above privacy statement and consent to the uses and disclosures listed therein and to other uses and disclosures allowed under the Act. I also consent to the transfer of our information, including personal information and tax file numbers, to another organisation on the sale, transfer or disposal of your business.

INFORMATION REQUIRED FOR APPLICATION:

POERSONAL DETAILS: Full name; DOB; Tax File Number; postal address; occupation; contact phone number and email address.

EMPLOYER INFORMATION: Employer ABN; name; Postal address of Pay Officer; employee no; pay office phone no; pay frequency; current pay slip.

INVESTMENT/LOAN INFORMATION: Rental property address or investment name; % ownership; date first income producing; gross rent per week; loan balance at beginning of year; loan interest rate; depreciation report deductions; other deductions relating to the investment (eg. rates, insurance, repairs, body corporate, borrowing expenses, management fees, bank fees etc).

OTHER: There will be some expenses that you may not be sure about. Include as much information in the form as possible. If we have any trouble completing the application we will contact you.

HOW TO USE AN ITWV:

Using the My ITWV Direct service you can provide us with the information necessary to lodge an ITWV application form with the Australian Taxation Office (ATO). Once processed, the ATO will notify your employer of a "varied" amount of tax to be withheld from your regular pay, increasing the amount of your take home pay. The variation is valid for the whole of the financial year to which it relates (1 July to 30 June next).

PAYMENT (note: a tax invoice and receipt will be forwarded to your postal address)

I wish to pay My Tax Zone by:

Cheque (Payable to My Tax Zone) Credit Card (See below)

Direct Credit (BSB: 484-799; A/C: 500957666)

Amount Payable: \$.....

Credit Card Payment:

I hereby authorise Elyon Enterprises Pty Ltd, trading as My Tax Zone, to debit my credit card for the above amount as follows:

Card type: Visa Mastercard

Card No. _____ / _____ / _____ / _____

Expiry _____ / _____

Name on card _____

Security No. (on back of card): _____

Signature _____

Send to:

Mail: My Tax Zone, PO Box 368, Woodridge, QLD 4114

Fax: 07 3808 9589

Email: lodge@mytaxzone.com.au

My ITWV Direct

Income Tax Withholding Variation (ITWV) Application

Application year: _____

PERSONAL INFORMATION

Your Full Name: _____

D.O.B.: _____ T.F.N: _____

Your Postal Address: _____

Occupation: _____

Contact Ph.: _____

Email Address: _____

EMPLOYER INFORMATION

Employer's ABN: _____

Name of Employer: _____

Postal address of Pay Office: _____

Pay Office Phone: _____

Employee No. (if any) : _____

Current Pay Period (week/fortnight/month): _____

Current Gross Salary/wage per Pay Period & Y-T-D:

Last Pay: _____ Y-T-D: _____

Current Tax Withheld per Pay Period & Y-T-D:

Last Pay: _____ Y-T-D: _____

Date of Current Pay Slip: _____

Your Estimated Gross salary/earnings
for the Application year (including bonuses): _____

PROPERTY/LOAN INFORMATION

Property 1

Property 2

Property 3

Property Address: _____

Percentage of Ownership: _____

Date first rented: _____

Dates available for rent in
application year (from - to): _____

Gross Rent per Week: _____

Loan Balance and Interest Rate (beginning Fin. year) Bal: _____ Rate: _____

Bal: _____

Rate: _____

Bal: _____

Rate: _____

Depreciation (from Quantity
Surveyor Report): _____

Building Write-off (from Quantity
Surveyor Report): _____

Rates/Insurance (for period of
Application Period): _____

Estimate of Other Expenses
(Agent fee, travel, repairs &
maintenance, advertising,
pest control, cleaning etc): _____

OTHER INCOME AND WORK RELATED DEDUCTIONS

Will you receive income from other
Sources for the application year
(show \$ and type of income)? _____

Work Related Deductions
(eg. Work related travel, uniforms,
union fees, phone etc)? _____

DECLARATION

Even though My Tax Zone will lodge your ITWV application, you are responsible for the information provided. By submitting this form to My Tax Zone you are making the following declaration:

I declare that:

1. All information I have given on this application, including any attachments, is true and correct;
2. I have provided an estimate of all my income (including net capital gains) for tax purposes for the application year.

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Income Tax Withholding Variation (ITWV) Application

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Your Full Name: _____

D.O.B.: _____ T.F.N.: _____

Your Postal Address: _____

Occupation: _____

Contact Ph.: _____

Email Address: _____

EMPLOYER INFORMATION

Employer's ABN: _____

Name of Employer: _____

Postal address of Pay Office: _____

Pay Office Phone: _____

Employee No. (if any) : _____

Current Pay Period (week/fortnight/month): _____

Current Gross Salary/wage per Pay Period & Y-T-D:

Last Pay: _____ Y-T-D: _____

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RENTAL PROPERTY SCHEDULE—Property # 1Address of property _____

Date property first became available for rent: _____

Number of weeks rented: _____

INCOME

Rental income _____

EXPENSES

Advertising for tenants
 Body corporate fees
 Borrowing expenses
 Cleaning
 Council rates
 Capital allowances (depreciation on plant)
 Gardening/lawn mowing
 Insurance
 Interest on loan(s)
 Land tax
 Legal fees
 Pest control
 Property agent fees/commission
 Repairs and maintenance
 Capital works (special building write-off)
 Stationery, telephone and postage
 Travel expenses
 Water charges
 Sundry rental expenses _____

Total Expenses _____

NET RENT _____**RENTAL PROPERTY SCHEDULE—Property # 2**Address of property _____

Date property first became available for rent: _____

Number of weeks rented: _____

INCOME

Rental income _____

EXPENSES

Advertising for tenants
 Body corporate fees
 Borrowing expenses
 Cleaning
 Council rates
 Capital allowances (depreciation on plant)
 Gardening/lawn mowing
 Insurance
 Interest on loan(s)
 Land tax
 Legal fees
 Pest control
 Property agent fees/commission
 Repairs and maintenance
 Capital works (special building write-off)
 Stationery, telephone and postage
 Travel expenses
 Water charges
 Sundry rental expenses _____

Total Expenses _____

NET RENT _____**Forward bto:**

Mail >> My Tax Zone, PO Box 368 Woodridge, 4114; Fax >> 07 38089589; Email >> lodge@mytaxzone.com.au; Delivery >> Shop 5, 84 Wembley Rd, Woodridge, Q 4114