



p 1300 76 35 75
 f 03 8648 6821
 e taxinfo@phatreturns.com.au
 w www.phatreturns.com.au

Defence Force Tax Return Form

A.B.N. 40 126 260 240

Client status: **New** or **Existing** (circle) Please fill all sections that apply to you or **otherwise leave blank**

How did you discover P.H.A.T. Returns? Defence News/Northern Courier/Infantry/Medic/Ordnance Mag/Website/Yellow pages Online/Friend _____

Number of PAYG summaries (group certificates): _____ **(please attach)**

Rank: _____ First Name: _____ Middle Name: _____ Surname: _____

Date of Birth: _____ Sex: M / F ADF: Army/Navy/Airforce Base/Ship: _____

Address: _____ Suburb: _____ Postcode: _____ Mobile: _____

Contact Number for booking: _____ Email Address: _____

Are you married or de facto (lived with spouse for more than 6 months)? If yes, you must supply the ATO with details on your spouse as below:

Spouses Full Name: _____ Date of birth: _____ Spouses Taxable Income: _____

Is your Spouse also an ADF member? _____ Do you have any dependent children? If yes, how many? _____ Child support paid? _____

Job Type e.g. Rifleman, Marine Tech, Aircraft Mechanic, etc: _____ Tax File Number: _____

Bank Account Details BSB: _____ Account number: _____ Name on account: _____

How much interest did you earn on bank accounts? _____ Did you receive any dividends? _____ If yes, please attach

Do you have a managed fund? _____ If yes, please attach parts A, B and C from your fund statement or the tax return section

Did you trade shares? Did you have a capital gain/loss? If so, attach all information regarding buying and selling of shares.

Do you have a Higher Education Learning Programme (HELP) aka (HECS) or Student Financial Supplement Scheme (SFSS) debt? If yes, how much: _____

Do you have Debts to Centrelink/Family Assistance Office/ATO? If yes, how much: _____

Investment Property Information

Purchase date: _____ Purchase Price (less stamp duty): _____ Date first earned rental income: _____

Address of property: _____ Year of Construction: _____

Gross Rental Income: _____ Weeks rented: _____ Is this a shared rental? If so with whom: _____ Percentage split? _____

Annual Expenses

Advertising: _____ Body Corporate: _____ Borrowing Fees: _____ Cleaning: _____ Council Rates: _____

Gardening: _____ Insurance: _____ Loan Interest: _____ Land Tax: _____ Legal Fees: _____

Property Agent Fees: _____ Repairs, maintenance: _____ Stationery/phone/postage: _____ Vehicle Expenses: _____

Travel Expenses: _____ Water Charges: _____ Other Rental Expenses: _____

Please attach your depreciation schedule or does P.H.A.T. Returns have already? _____

If you don't have one, call Australian Tax Depreciation Services on 1300 557 342 a month before your booking



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You must attach the receipts and bills if the total deductions on your tax return are over \$1000

Date of Purchase	Item	Quantity	Total Amount	Label all receipts attached and indicate label below
	Uniform Purchases from uniform shops; including boots, parade shoes(excluding razors, civilian suits) Attach list			
	Replacement Runners (Only if in SF unit, PTI , CFL or MFL)			
	PT gear (Only with registered ADF logo)			
	ADF team sporting clothing and footwear			
	Dry Cleaning of uniforms(not civilian clothing)			
	Medal Mounting			
	Watch(multi function)			
	Protective Eyewear			
	Pack			
	Swag			
	Sleeping Bag			
	Webbing			
	Pouches			
	Bivvy Bag			
	Dive Bag			
	Leatherman			
	Compass			
	Headlamp			
	Torch			
	Medkit			
	Knife			
	GPS			
	Camel Bak			
	Water Bottle			
	Tools			
	Fitness Equipment (Only if in SF unit, PTI , CFL or MFL)			
	Gym Membership (Only if in SF unit, PTI , CFL or MFL)			
	Supplements (Only if in SF unit, PTI , CFL or MFL)			
	ADF team sporting equipment			
	Diving Gear			
	Laptop computer			
	Desktop computer			
	Mess fees Monthly (Only Senior non-commissioned officers and above)			
	Mobile Phone Plan (Attach page of bill showing plan amount)			
	Internet (Attach page of bill showing plan amount)			
	Other Items please supply list:			

**FAX (03) 8648 6821 OR EMAIL THIS FORM, PAYG SUMMARIES AND ATTACHMENTS
 A MINIMUM OF 24 HOURS PRIOR TO YOUR BOOKING**