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## Standard Tax Return Form

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

How did you discover P.H.A.T. Returns? Friend/Website/Yellowpages/Other: \_\_\_\_\_

Number of PAYG Summaries (group certificates) including Centrelink : \_\_\_\_\_ **(please attach all)**

Title: \_\_\_\_\_ Name: \_\_\_\_\_ Middle Name: \_\_\_\_\_ Surname: \_\_\_\_\_

Date of Birth: \_\_\_\_\_

Home Address: \_\_\_\_\_

Landline contact number for booking: \_\_\_\_\_ Mobile: \_\_\_\_\_

Email Address: \_\_\_\_\_

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

Spouses Full Name: \_\_\_\_\_ Date of Birth: \_\_\_\_\_ Spouses Taxable Income: \_\_\_\_\_

Do you have any dependents? If yes, how many? \_\_\_\_\_ Child Support paid? \_\_\_\_\_

Job Type: \_\_\_\_\_ Employer: \_\_\_\_\_

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

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

Do you have a managed fund? \_\_\_\_\_ If yes, please attach parts A, B and C from your fund statement or tax return summary

Do you have private health insurance? \_\_\_\_\_ If yes, please attach statement from your fund

Do you have a Higher Education Learning Programme (HELP) aka (HELP) debt? If yes, how much: \_\_\_\_\_

Do you have a Student Financial Supplement Scheme (SFSS) debt? If yes, how much: \_\_\_\_\_

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

### ABN Information

ABN: \_\_\_\_\_ Trading name: \_\_\_\_\_ Business type: \_\_\_\_\_ Address: \_\_\_\_\_

ABN Total Revenue: \_\_\_\_\_ ABN Total Expenses (please attach profit and loss statement or list of expenses): \_\_\_\_\_

**Please fax or email this form, PAYG Summaries (Group Certificates), and attach the written evidence for any items over \$300 and if your total purchases are over \$1000.**

**A MINIMUM OF 24 HOURS PRIOR TO YOUR BOOKING**

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