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Travel Agents Tax Return Form

A.B.N. 40 126 260 240

Client status: **New** or **Existing** _____

Number of PAYG summaries (group certificates) including Centrelink: ____ (**please attach**)

Title: _____ First Name: _____ Middle Name: _____ Surname: _____

Date of Birth: _____ Address: _____ Suburb: _____ Postcode: _____

Mobile: _____ Alternate Contact: _____ 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 on your spouse as below

Spouses Name: _____ Date of Birth: _____ Spouses Taxable Income: _____

Are they a P.H.A.T. Returns Client? ____ Do you have any dependents? If yes, how many? ____ Do you pay child support? If yes, how much? ____

Job Type: _____ Company: _____ 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 tax return information

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

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

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

HELP _____ SFSS _____ Do you have Debts to Centrelink/Family Assistance/ATO? _____

Investment Property Information

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

Address: _____ Suburb: _____ Postcode: _____ 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: _____ (**please attach report**) Repairs, maintenance: _____ 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 ATDS on 1300 557 342 or DEPPRO on 1300 888 489 at least a month before your booking

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 claims are over \$1000.

A MINIMUM OF 24 HOURS PRIOR TO YOUR BOOKING



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As a travel agent you may be eligible for a deduction for the private travel that you do each year.

1. The destination must be connected to a travel related product that you sold in the financial year that you travelled.
2. You must have written evidence of all claims and they must be attached to this form.

TRIP 1

Destination: _____

Dates of travel: _____

Were any of the expenses of the travel paid for by your employer? If yes, what? _____

Were you travelling alone? If no, with whom? _____

Have you travelled to the destination before? If yes, when? _____

Expenses as attached: ONLY INCLUDE YOUR EXPENSES Total AUS\$

Travel to and from airport	
Airport parking	
Flights	
Accommodation	
Car hire	
Tours and other attractions	
Food	
Other (Attach an itemised list)	

TRIP 2

Destination: _____

Dates of travel: _____

Were any of the expenses of the travel paid for by your employer? If yes, what? _____

Were you travelling alone? If no, with whom? _____

Have you travelled to the destination before? If yes, when? _____

Expenses as attached: ONLY INCLUDE YOUR EXPENSES Total AUS\$

Travel to and from airport	
Airport parking	
Flights	
Accommodation	
Car hire	
Tours and other attractions	
Food	
Other (Attach an itemised list)	