



A.B.N. 40 126 260 240

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## Travel Agents Form

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?

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? \_\_\_\_

Your Job: \_\_\_\_\_ 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), Student Financial Supplement Scheme (SFSS) or Trade Support Loan (TSL) debt?

If yes, how much? HELP \_\_\_\_\_ SFSS \_\_\_\_\_ TSL \_\_\_\_\_ 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: \_\_\_\_\_ Repairs, maintenance: \_\_\_\_\_ Stationery/phone/postage: \_\_\_\_\_

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 yet, call 1300 990 612 or click here



### 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 receipts for any items over \$300.**

**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)	