210 Lower Heidelberg Road, East Ivanhoe Vic 3079 **Ph:** (03) 9497 2222 **Fax:** (03) 9497 4477



Email: contact@aspirewealthgroup.com.au Web:

www.aspirewealthgroup.com.au

## Client Details Form 2019 Individual Income Tax Return

Full Name			
Tax File Number			
Date of birth		//	
ABN (if applicable)			
Address			
Address (postal) (Put 'as above' if the same)			
	Mobile:		
Telephone contacts	Business Hours (work):		
	After Hours (home):		
Email		@	
Electronic banking	BSB:		
(for refund if applicable)	Account Number:		
Occupation			
	Do you run your own bu	usiness as a sole trader?	YES/NO
	Do you run your own bu	usiness in a company, trust or pa	ortnership? YES/NO
Spouse's full name			
(Please include married/de	facto/same-sex)		
Spouse's date of birth			
Spouse's TFN			
Approximate Income (if known	own)		

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Salary or wages			
Allowances, earnings, tips, director's fees etc.			
Employer lump sum payments			
Employment termination payments			
Australian Government allowances and payments like Newstart, Youth Allowance and			
Austudy payments			
Australian Government pensions and allowances			
Australian annuities and superannuation income streams			
Australian superannuation lump sum payments			
Attributed personal services income			
Gross Interest			1
Dividends			1
Employee share schemes			
Distributions from partnerships and/or trusts			1
Personal services income (PSI)			
Net income or loss from business (as a sole trader)			
Deferred non-commercial business losses			
Net farm management deposits or repayments			
Capital gains			
Foreign entities:			
Direct or indirect interests in a controlled foreign company			
Transfer of property or services to a non-resident trust			
Foreign source income (including foreign pensions) and foreign assets or property			
Rent			
Bonuses from life insurance companies or friendly societies			1
Forestry managed investment scheme income			
Other income (please specify below)			
	<u>I</u>	1	
	Australian Government allowances and payments like Newstart, Youth Allowance and Austudy payments  Australian Government pensions and allowances  Australian annuities and superannuation income streams  Australian superannuation lump sum payments  Attributed personal services income  Gross Interest  Dividends  Employee share schemes  Distributions from partnerships and/or trusts  Personal services income (PSI)  Net income or loss from business (as a sole trader)  Deferred non-commercial business losses  Net farm management deposits or repayments  Capital gains  Foreign entities:  Direct or indirect interests in a controlled foreign company  Transfer of property or services to a non-resident trust  Foreign source income (including foreign pensions) and foreign assets or property  Rent  Bonuses from life insurance companies or friendly societies  Forestry managed investment scheme income	Australian Government allowances and payments like Newstart, Youth Allowance and Austudy payments  Australian Government pensions and allowances  Australian annuities and superannuation income streams  Australian superannuation lump sum payments  Attributed personal services income  Gross Interest  Dividends  Employee share schemes  Distributions from partnerships and/or trusts  Personal services income (PSI)  Net income or loss from business (as a sole trader)  Deferred non-commercial business losses  Net farm management deposits or repayments  Capital gains  Foreign entities:  Direct or indirect interests in a controlled foreign company  Transfer of property or services to a non-resident trust  Foreign source income (including foreign pensions) and foreign assets or property  Rent  Bonuses from life insurance companies or friendly societies  Forestry managed investment scheme income	Australian Government allowances and payments like Newstart, Youth Allowance and Austudy payments  Australian Government pensions and allowances  Australian annuities and superannuation income streams  Australian superannuation lump sum payments  Attributed personal services income  Gross Interest  Dividends  Employee share schemes  Distributions from partnerships and/or trusts  Personal services income (PSI)  Net income or loss from business (as a sole trader)  Deferred non-commercial business losses  Net farm management deposits or repayments  Capital gains  Foreign entities:  Direct or indirect interests in a controlled foreign company  Transfer of property or services to a non-resident trust  Foreign source income (including foreign pensions) and foreign assets or property  Rent  Bonuses from life insurance companies or friendly societies  Forestry managed investment scheme income

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**Deductions – Please provide evidence** Yes **Unsure** No D1. Work related car expenses • Cents per kilometre method (up to a maximum of 5,000 kms) · Log book method D2. Work related travel expenses Employee domestic travel with a reasonable travel allowance • If the claim is more than the reasonable travel allowance rate, do you have receipts for your expenses? Overseas travel with a reasonable travel allowance • Do you have receipts for accommodation expenses? • If travel is for 6 or more nights in a row, do you have travel records (e.g. a travel diary)? Employee travel without a reasonable travel allowance • Did you incur and have receipts for airfares? • Did you incur and have receipts for accommodation? • Did you incur and have receipts for hire cars (if applicable)? • Did you incur and have receipts for airfares? • Did you incur and have receipts for meals and incidental expenses? • Do you have any other travel expenses? Other work-related travel expenses (e.g. a borrowed car, public transport) (Please Specify) D3. Work-related uniform and other clothing expenses **Protective Clothing Occupation Specific Clothing** Non-compulsory uniform Compulsory uniform Conventional clothing Laundry expenses (up to \$150 without receipts) Dry cleaning expenses Other claims such as mending/repairs, etc. (please specify)

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Deductions (Continued) – Please provide evidence	Yes	No	Unsure
D4. Work related self-education expenses			
Course taken at educational institution:			
Union fees			
Course fees			
Books, stationery			
Travel			
Other (Please specify)			
D5. Other Work-related expenses			
Home Office Expenses			
Computer and software			
Telephone/mobile phone			
Tools and equipment			
Subscriptions and union fees			
Journals or periodicals			
Depreciation			
Sun protection products (i.e. sunscreen and sunglasses)			
Seminars and courses not at an educational institution			
Any other work-related deductions (please specify)			
	1	•	•
Other Types of Deductions			
D6. Low value pool deduction			
D7. Interest deductions			
D8. Dividend deductions			
D9. Gifts or donations			
D10 Cost of managing tax affairs			
<ul> <li>Interest charged by the ATO (e.g. including SIC and GIC)</li> </ul>			
Litigation costs			
Other expenses incurred in managing tax affairs			
D11. Deductible amount of undeducted purchase price of a foreign pension or annuity			

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Deductions (Continued) – Please provide evi	dence	Yes	No	Unsure
D12. Personal superannuation contributions				
Full name of fund	Account Number:		<u> </u>	
Fund ABN:	Fund TFN:			
Have you provided the fund a notice of intent	tion to deduct the contribution?			
Has this notice been acknowledged by the fur	nd?			
Other types of deductions (continued)				
D13. Deduction for project pool		T		
D14. Forestry managed investment scheme deduction				
D15. Other deductions (please specify)				
L1. Tax losses of earlier income years				

Tax offsets/rebates – Please provide evidence	Yes	No	Unsure
T1. Are you a senior Australian or pensioner?			
T2. Did you receive an Australian superannuation income stream?			
T3. Did you make superannuation contributions on behalf of your spouse?			
T4 Did you live in a remote area of Australia or serve overseas with the Australian Defence			
Force or the UN armed forces in the 2019 income year?			
T5. Did you have net medical expenses for disability aids, attendant care or aged care in the			
2019 income year?			
T6. Did you maintain a dependant who is unable to work due to invalidity or carer			
obligations in the 2019 income year?			
T7. Are you entitled to claim the landcare and water facility tax offset?			
T8. Are you involved in an early stage venture capital limited partnership?			
T9. Are you an early stage investor in an early stage innovation company?			
T10. Are you entitled to any other non-refundable tax offsets? (Please specify below)			
T11. Are you entitled to any other refundable tax offsets? (Please specify below)			

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	Other relevant information – Please provide evidence	Yes	No	Unsure
A.	Are you entitled to the Medicare levy exemption or reduction in the 2019 income year?			
	If yes, please specify:			
В.	Did you and your spouse/dependants have private health insurance in the 2019 income year?			
	(If yes, please provide the annual statement requested from your health fund)			
C.	Were you under 18 years old on 30 June 2019?			
D.	Did you become an Australian tax resident at any time during the income year?			
E.	Did you cease to be an Australian tax resident at any time during the income year?			
F.	Did you make a non-deductible (non-concessional) personal super contribution?			
G.	Do you have a HELP liability, Student Financial Supplement Loan debt, Student Start-Up Load debt or Trade Support Loan debt?			
Н.	Are you a working holiday maker in Australia on a 417 (working holiday) visa or 462 working holiday) visa?			
I.	Did a trust or company distribute income to you in respect of which Family Trust  Distribution Tax (FTDT) was paid by the trust or company? (Please specify below)			
J.	Do you have a loan with a private company at 30 June 2019 or has such a loan amount been forgiven in the 2019 income year? Has a private company made a payment to you in the 2019 income year (other than a dividend)? (Please specify below)			
K.	Did you receive any benefit from an employee share acquisition scheme?			
K.	Did you receive any benefit from an employee share acquisition scheme?  Family Tax Benefit ('FTB'):			
L.	Family Tax Benefit ('FTB'):			
L.	Family Tax Benefit ('FTB'):  Did you have care of a dependent child in the 2019 income year?			
L. •	Family Tax Benefit ('FTB'):  Did you have care of a dependent child in the 2019 income year?  Did you or your spouse receive FTB through the Department of Human Services in the			
L. •	Family Tax Benefit ('FTB'):  Did you have care of a dependent child in the 2019 income year?  Did you or your spouse receive FTB through the Department of Human Services in the 2019 income year?			
L. •	Family Tax Benefit ('FTB'):  Did you have care of a dependent child in the 2019 income year?  Did you or your spouse receive FTB through the Department of Human Services in the 2019 income year?  Income Tests information			
L. • Ir	Family Tax Benefit ('FTB'):  Did you have care of a dependent child in the 2019 income year?  Did you or your spouse receive FTB through the Department of Human Services in the 2019 income year?  Income Tests information  Do you have any reportable fringe benefits amounts in the 2019 income year?			
L. • Ir	Family Tax Benefit ('FTB'):  Did you have care of a dependent child in the 2019 income year?  Did you or your spouse receive FTB through the Department of Human Services in the 2019 income year?  Income Tests information  Do you have any reportable fringe benefits amounts in the 2019 income year?  Do you have any reportable employer superannuation contributions in the 2019 income			
L. • Ir	Family Tax Benefit ('FTB'):  Did you have care of a dependent child in the 2019 income year?  Did you or your spouse receive FTB through the Department of Human Services in the 2019 income year?  Income Tests information  Do you have any reportable fringe benefits amounts in the 2019 income year?  Do you have any reportable employer superannuation contributions in the 2019 income year?			
L.  Irr	Family Tax Benefit ('FTB'):  Did you have care of a dependent child in the 2019 income year?  Did you or your spouse receive FTB through the Department of Human Services in the 2019 income year?  Income Tests information  Do you have any reportable fringe benefits amounts in the 2019 income year?  Do you have any reportable employer superannuation contributions in the 2019 income year?  Did you receive any tax-free government pensions in the 2019 income year?			
L.  Iri	Family Tax Benefit ('FTB'):  Did you have care of a dependent child in the 2019 income year?  Did you or your spouse receive FTB through the Department of Human Services in the 2019 income year?  Income Tests information  Do you have any reportable fringe benefits amounts in the 2019 income year?  Do you have any reportable employer superannuation contributions in the 2019 income year?  Did you receive any tax-free government pensions in the 2019 income year?  Did you receive any target foreign income in the 2019 income year?			
L.  Ir	Family Tax Benefit ('FTB'):  Did you have care of a dependent child in the 2019 income year?  Did you or your spouse receive FTB through the Department of Human Services in the 2019 income year?  Income Tests information  Do you have any reportable fringe benefits amounts in the 2019 income year?  Do you have any reportable employer superannuation contributions in the 2019 income year?  Did you receive any tax-free government pensions in the 2019 income year?  Did you receive any target foreign income in the 2019 income year?  Did you have a net financial investment loss in the 2019 income year?			

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Other relevant information – Please provide evidence	Yes	No	Unsur
Spouse Details (if applicable)			
Did you have a spouse for the full year from 1 July 2018 to 30 June 2019? If you ha spouse for only part of the income year, please specify the dates between 1 July 20 June 2019 when you had a spouse?  From / / to / /			
What was your spouse's taxable income for the 2019 income year?	\$		
Does your spouse have a share of trust income on which the trustee is assessed un	nder		
Section 98 that has not been included in your spouse's taxable income?			
Did a trust or company distribute income to your spouse in respect of which family	/ trust		
distribution tax was paid by the trust or company for the 2019 income year?			
Did your spouse have any reportable fringe benefits amounts for the 2019 income	year?		
Did your spouse receive any Australian Government pensions or allowances (not in	ncluding		
exempt pension income) in the 2019 income year?			
Did your spouse receive any exempt pension income in the 2019 income year?			
Did your spouse receive any tax-free government pensions paid under the Military	′		
Rehabilitation and Compensation Act 2004?			
Does your spouse have any reportable employer superannuation contributions or			
deductible personal superannuation contributions for the 2019 income year?			
• Did your spouse receive any 'target foreign income' in the 2019 income year?			
Did your spouse have a total net investment loss (i.e., the total of any financial investment)	estment		
loss and a rental property loss) for the 2019 income year?			
Did your spouse pay child support during the 2019 income year?			
If your spouse is aged between their preservation age and 59 years old, did they re	eceive a		
superannuation lump sum (other than a death benefit) during the 2019 income ye	ar that		
included a taxed element that does not exceed their low rate cap?			
Additional notes/concerns:			
Dated://			
Signature of taxpayer:			
Name (Print)			