

# Tax Return Information Form

## 2019 Individual Tax Return



Please return this form back to our office **PRIOR** to your appointment, contact us for your own private secure Dropbox!

**TO:** Excel Financial Advisors Pty Ltd  
**ATTENTION:** Stuart Fitzpatrick

**FAX:** (02) 4997 6695  
**E-MAIL:** admin@exceladvisors.com.au

<b>CLIENT NAME:</b>		<b>CLIENT SIGNATURE:</b>	
<b>INFORMATION FOR 2019 TAX RETURN (1 July 2018 to 30 June 2019)</b>			
<b>Name:</b>		<b>Spouse Name:</b>	
<b>DOB:</b>		<b>Spouse DOB:</b>	
<b>Residential Address:</b>		<b>Postal Address:</b>	
<b>TFN:</b>		<b>Email:</b>	
<b>Phone:</b>	<b>W</b>	<b>H</b>	<b>M</b>
<b>BANK DETAILS (if you are expecting a refund, you MUST provide the ATO your EFT Bank Details)</b>			
<b>Account Name:</b>		<b>Bank Name:</b>	
<b>BSB:</b>		<b>Account No.:</b>	
<b>CHILDREN (if dependant)</b>			
<b>Name:</b>		<b>Name:</b>	
<b>DOB:</b>		<b>DOB:</b>	
<b>Name:</b>		<b>Name:</b>	
<b>DOB:</b>		<b>DOB:</b>	
<b>PAYG PAYMENT SUMMARIES (Please Attach, Fax or Email All Slips)</b>			
<b>Employer:</b>	<b>Occupation:</b>	<b>Gross:</b>	<b>Tax:</b>
		\$	\$
		\$	\$
		\$	\$
<b>BANK INTEREST</b>			
<b>Bank:</b>	<b>Amount:</b>	<b>TFN Credits:</b>	<b>Bank Charges:</b>
	\$		
	\$		
<b>WORK &amp; OTHER EXPENSES (Please Attach, Fax or Email Detailed Listing)</b>			
<b>Motor Vehicle Type:</b>		<b>Reference Books:</b>	\$
<b>Engine Size (litres):</b>		<b>Stationery:</b>	\$
<b>Work Kilometres:</b>		<b>Mobile Phone:</b>	\$
<b>Taxi Fares:</b>	\$	<b>Internet:</b>	\$
<b>Other Travel:</b>	\$	<b>Memberships:</b>	\$
<b>Uniform/Laundry:</b>	\$	<b>Tools &amp; Equipment:</b>	\$
<b>Sun Protection Items:</b>	\$	<b>Interest expenses:</b>	\$
<b>Self-Education:</b>	\$	<b>Gifts &amp; Donations:</b>	\$
<b>Union Fees:</b>	\$	<b>Income Protection Insurance:</b>	\$
<b>Seminars/Prof Development:</b>	\$	<b>Other Expenses:</b>	<b>Please Attach Details</b>
<b>PRIVATE HEALTH INSURANCE</b>			
<b>Fund Name:</b>		<b>Type of Cover:</b>	
<b>Membership No:</b>		<b>Days Covered:</b>	<b>Excess:</b>
<b>Rebate Claimed?</b>	<input type="checkbox"/> Yes <input type="checkbox"/> No	<b>If Yes What %</b>	
<b>Did you pay any child support during the year, if so how much?</b>			
<b>DO YOU HAVE ANY OF THESE ITEMS?</b> (If so, then please download additional forms from <a href="http://www.exceladvisors.com.au">www.exceladvisors.com.au</a> )		<input type="checkbox"/> Investment Income <input type="checkbox"/> Rental Properties <input type="checkbox"/> Investments Sold <input type="checkbox"/> Motor Vehicles used for Work	