**GLENN PANNAM ACCOUNTING**

**2022 Individual Tax Return Questionnaire**

Please email or post this form back to our office **PRIOR** to your appointment:

**Phone:** 03 92581600

**EMAIL:** bill@dblegal.com.au, glenn@dblegal.com.au

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| **PERSONAL INFORMATION – for New Client** |
| **Name:** |  | **Spouse name:** |  |
| **DOB:** |  | **Spouse DOB:** |  |
| **Address:** |  | **Spouse Taxable Income:** |  |
|  | **No of Dependants:** |  |
| **Email:** |  |
| **TFN:** |  |
| **Phone:** | **W** |  | **H** |  | **M** |  |
| **Bank Details for Refund: Account Name: BSB: A/C No:** |
|  |
|  **PAYG SUMMARIES (Group Certificates)** |
| **We will obtain your PAYG Summaries from the ATO Portal – please confirm these when we send you your tax return.** |
| **Bank Interest Received** |
| **Bank:**  | **Amount:** | **TFN Credits:** | **Bank Charges:** |
|  | **$** |  |  |
|  | **$** |  |  |
| **WORK EXPENSES** |
| **Business Travel Fare:** | **$** | **Self-Education:** | **$** |
| **Business Travel Accommodation:** | **$** | **Seminars/Prof Dev:** | **$** |
| **Uniform:** | **$** | **Reference Books:** | **$** |
| **Uniform:** | **$** | **Stationery:** | **$** |
| **Union Fees:** | **$** | **Other Expenses:** | **Please attach details** |
| **Work Phone & Internet:** | **$** | **Work From Home hours:**  | **$** |
| **Computer:** | **$** | **Covid-19 Testing Expenses** | **$** |
| **Charity Donation:**  | **$** |  |  |
| **PRIVATE HEALTH INSURANCE** |
| **Fund name:** |  | **Type of Cover:** | □ **Hospital Cover**□ **Extra Cover** |
| **Membership No:** |  |
| **DO YOU HAVE ANY OF THESE ITEMS?** | □ Investment Income □ Rental Properties□ Investments Sold □ Motor Vehicles used for Work |
|  |
| **Additional Notes:** |
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