



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

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:	<input type="checkbox"/> Hospital Cover	
Membership No:				<input type="checkbox"/> Extra Cover	
DO YOU HAVE ANY OF THESE ITEMS?			<input type="checkbox"/> Investment Income <input type="checkbox"/> Rental Properties		
			<input type="checkbox"/> Investments Sold <input type="checkbox"/> Motor Vehicles used for Work		
Additional Notes:					