



**KK PARTNERS GROUP**  
**CHARTERED ACCOUNTANTS**



## 2021 INDIVIDUAL INCOME TAX QUESTIONNAIRE

Name:  
Date of Birth:  
Address:

Spouse Name:  
Taxable Income:  
No. of Dependents:  
Did you have Private  
Health Insurance?  
Bank Account for Tax Refund:  
Account Name:  
BSB:  
Account Number:

Mobile:  
Email:  
Occupation:  
Signing Method:

### INCOME

*Did you earn any of the following types of income: (if Yes, please provide copies of statements or details)*

Salary or Wages

Employment Termination Payment

Government Benefits (Centrelink Payments  
incl. Newstart, Youth Allowance, JobSeeker)

Superannuation Income Streams

Superannuation Lump Sum Payment

Interest Income

BSB:	Account No.:	Interest:	Withholding Tax Paid:	Ownership:
BSB:	Account No.:	Interest:	Withholding Tax Paid:	Ownership:

Dividend Income

Rental Property Income

Capital Gains

Please provide details of any assets sold during the year (shares, managed funds, property, etc)

Partnership Income

Trust Distribution Income

Business Income

Did you receive any income through a personal ABN? Please provide details of any income(invoices) and expenses  
Do you run a datafile for your business?

Foreign Income

Please provide details of any Foreign Income, Expenses and Tax Withheld

Other Income

Did you receive additional/Stand-down  
payments because of Covid19?

Did you receive JobKeeper as a  
Business Participant (i.e. as a soletrader)

## Rental Property Details

Please provide annual rental summary, expenses and loan statements

Address of Rental Property

Ownership of property

Dates rented during financial year

From:

To:

Was the property sold during the year?

If yes, please provide rental statements and details of sale including

Purchase Date:

Purchase Price:

Date Sold:

Sale Price:

Address of Rental Property

Ownership of property

Dates rented during financial year

From:

To:

Was the property sold during the year?

If yes, please provide rental statements and details of sale including

Purchase Date:

Purchase Price:

Date Sold:

Sale Price:

## DEDUCTIONS

### Motor Vehicle

Have you used your car for work-related travel?

Make / Model of car

Estimate of total km travelled for the year

Fuel Costs

Repairs and Services

Registration

Insurance

Lease Payments

Business Use Percentage

If claiming more than 5,000km, please provide a logbook

### Work Related Travel Expenses

Have you undertaken any work related travel in Australia or Overseas?

Purpose of trip

Accommodation Expenses

Airfare Expenses

Seminar/Conference Expenses

Other

### Clothing (Protective and/or Uniform)

Protective clothing/uniform

Protective footwear

Laundry & cleaning of protective clothing

Sunscreen / sunhat / sunglasses

### Self-Education Expenses

Have you undertaken any work related self-education?

Course fees

Union fees

Stationery

Parking

Books/Journals

Telephone/Internet

Travel Expenses

Other

self-education must be relevant to your current employment and not to open up a new source of income

## Other Work-Related Expenses

Stationery  
Tools & Equipment  
Professional Journals/Magazines  
Professional Associations  
Income Protection Insurance

Mobile  
Car Tolls  
Seminars/Conferences/Short Courses  
Union Fees  
Other

## Home Office Expenses

### Option 1: Percentage of Use

Internet Business Use  
Telephone Business Use  
Electricity Business Use

Select Option:

### Option 2: Fixed Rate per Hour

52cents x Hours Worked

## Were you forced to work from home due to Covid19?

A temporary option is available for employees that were forced to work from home due to Covid19 for the period 1 March 2020 to 30 June 2021, at a fixed rate of 80cents per hour for each hour worked  
Hours worked from 1 July 2020 to 30 June 2021

\*\* Please provide receipts, documents and records for all deductions to be claimed

## Gifts or Donations

Did you make donations of \$2 or more?  
please attach receipts or details of donations

## Interest & Dividend Deductions

Did you incur any expenses such as accounting fees, financial planning fees, investment journals or subscriptions?  
Did you pay any interest on a loan that was taken out for an income producing asset other than a rental property?  
Please attach details.

## Superannuation Contributions

Did you make any personal super contributions?  
Attach notice from Super Fund advising deductibility

## TAX OFFSETS

### Superannuation Tax Offset for Spouse

Did you pay any superannuation contributions on behalf of your spouse?  
Please provide details.

### Dependent Spouse, Child-housekeeper or housekeeper

In the 2021 tax year, did you have any of the following:

Child-Housekeeper  
Invalid Relative  
Housekeeper

## HECS/HELP DEBT

Do you have a HECS/HELP debt or Student Financial Supplement Scheme (SFSS) debt?  
For the 2020-21 income year, the compulsory repayment threshold is \$46,620

## EDUCATION

Did you cease full-time education during the year?  
If yes, what date did you cease?

## RESIDENCY

Did your Australian residency status change during the year?

i.e. did you work overseas during the year?

If yes, please provide details including dates:

## Supporting your claims

It is important that you keep accurate receipts and records to substantiate your claims, including log books for vehicle claims of more than 5,000km. Reasonable estimates may be used for claims less than 5,000km.

Please note, valid tax invoices must be retained for claims made in your tax return for 4 years after lodgement.

Receipts are not required up to a total of \$300, but full details must be recorded.

The ATO's "Building Confidence" publication indicates that the following activities continue to attract their attention:

- Claims for work-related expenses that are unusually high relative to others across comparable industries and occupations;
- Excessive rental property expenses; non-commercial rental income received for holiday homes; and
- Interest deductions claimed for the private proportion of loans

The list above is provided as a guide only and is not exhaustive. Should you have any other relevant information that could impact on your income tax return, please provide with this checklist.

## Substantiation Declaration

I have read and understood the substantiation declaration and can fully substantiate any claims that I have made.

Name:

Date:

When you have completed the Questionnaire, please forward to our office along with your supporting financial documentation.

## **KK Partners Group**

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