

EXCEL TAX & ACCOUNTING

FEE CAN BE DEDUCTED FROM REFUND

Web: www.exceltax.com.au

What To Do With Application

Send to: PO Box 641 Endeavour Hills VIC 3802

OR

Call: (03) 9700 0670 to make an appointment

OR

Fax to: (03) 9700 0670

OR

Email to: info@exceltax.com.au

2006 TAX RETURN PREPARATION APPLICATION

FULL NAME:

ADDRESS:

SUBURB: STATE: POST CODE:

TAX FILE NUMBER: DATE OF BIRTH:

GENDER: Female / Male OCCUPATION:

DEPENDANTS: Yes / No NUMBER:

EMAIL: MOBILE:

HOME PHONE: WORK PHONE:

SPOUSE NAME: SPOUSE TFN:

SPOUSE DATE OF BIRTH: PREFERRED CONTACT TIME:

INCOME (Please tick):

- Salary/Wage (Please provide PAYG Summary)
- Interest Earned
- Dividends (Please provide dividend statements)
- Business Income (please provide summary)
- Capital Gains (Please provide cost base & proceeds info)
- Managed Funds (Please provide tax statements)
- Eligible Termination Payments
- Annuities/Pensions
- Rental property (please provide income & expenses)
- Foreign Income
- Other income (please specify:))

DEDUCTIONS (Please tick):

- Motor Vehicle (logbook?)
- Work Related Expenses
- Home Office
- Donations
- Other deductions (Please specify.....))

OTHER (Please tick):

- Private Health Insurance (Please provide statement)
- Net Medical Expenses over \$1500
- Family Tax Benefits to be claimed
- Child Care Rebate (Please provide records from 2004/05)