FMW ACCOUNTANTS PTY LIMITED

INCOME TAX RETURN DATA COLLECTION SHEET YEAR ENDED 30 JUNE 2022



Title			
SURNAME:			
First Name:		Date	
Middle Name[s]:			
Date of Birth:			
Tax File Number:			
Address [Street]:			_
		State	_Postcode
Do you own this property? If so	: Market Value: \$	Loan: \$	
Is your interest rate the best ava Have you considered fixing your		?	
**Would you like our Mortga	age Consultant to contact you for a FREE review of your	loans?	
Address [Postal]:			
		State	_Postcode
Mobile:			
E-mail:			
	we will send you an invitation to join the FMW Document Hub – pl	lease look out for this en	nail to set up
Is this your first year as a clif YES - Please advise us or			
Occupation:			
Do you have a copy of last y If YES - Please provide	ear's tax return [For new clients only]		
-	Ethical letter to your previous accountant - countants Name & Address -		
Accountant: Address:			- -
	Postcode:		_
Please provide your Bank A Account Name:	account Details [ATO does not send out cheques anymore	9]	
BSB: [6 Digits]		lo:	- -

How many Jobs have you had during the year?

Please write no.

Did you receive Centrelink Payments during the year?

Please provide Income Statement [they should be in your mygov] & ETP Statements for each as well as Employee Share Scheme summaries/statements if applicable

f YES - Please provide	d <u>etails [if joint sho</u>	ow 100% of inter	Cot, and mark accor	alligiy, we will t	agaotj
	Account 1	Account 2	Account 3	Account 4	Account 5
Bank:					
BSB:					
Account Number:					
nterest Amount: \$					
Joint Y/N					
lave you received any Divi f YES - Please provide of if joint show 100% of d	details and attach ividend, and mark	relevant docum accordingly, we	e will adjust]		
Company Name	SRN / HIN	Date Paid	Unfranked Amount	Franked Amount	Imputation Cre
f YES - Please provide			·	0.01	
Please provide Tax Distribu	ution statements fron	n Managed Funds	/ Partnership / Trust Di	istributions	
			•		
	s related to the abov	e investments dur			
Have you had any Expense f YES - Please provide			ing the year?		
Other: Have you had any Expense If YES - Please provide (Expenses nterest		ow 100% of expe	ring the year? ense, and mark acco Amount		
Have you had any Expense If YES - Please provide (Expenses nterest Financial Planning Fees		ow 100% of expe	ring the year? ense, and mark acco		
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Have you received any Pandemic Leave Disaster Payment?

For CryptoCurrency - please provide full year tax report by downloading it in PDF and excel format.

21 Do you have a Rental Property?

If YES - Please provide details [if joint show 100% of rent & expenses, and mark accordingly]

Would you like our Mortgage Consultant to contact you for a review of your loans?

Rental Property 1		
Address of Property:		
	<u></u>	Postcode:
Cost of property:	\$	Date of purchase:
Date first became available	for rent:	
Year property built:		Percentage owned:
Is this property registered for	or Land Tax	
If NO - Please provide Appro	oximate LAND VALUE ONLY	\$
Amount outstanding on ban	k loan	\$
Approximate market value of	f the property	\$
Rental Property 2		
Address of Property:		
		Postcode:
Cost of property:	<u></u>	Date of purchase:
Date first became available	for rent:	
Year property built:		Percentage owned:
Is this property registered for	or Land Tax	
If NO - Please provide Appro	oximate LAND VALUE ONLY	\$
Amount outstanding on ban	k loan	\$
Approximate market value of	f the property	\$
Rental Property 3 Address of Property:		
		Postcode:
Cost of property:	\$	Date of purchase:
Date first became available	for rent:	<u>.</u>
Year property built:		Percentage owned:
Is this property registered for	or Land Tax	
If NO - Please provide Appro	oximate LAND VALUE ONLY	\$
Amount outstanding on ban	k loan	\$
Approximate market value o	f the property	\$

Can you claim depreciation on your rental properties?

NOTE: Income tax deductions for the decline in value of previously used plant and equipment in rental premises used for residential accommodation are no longer allowed.

The changes apply from 1 July 2017 to:

- => Previously used plant and equipment acquired at or after 7.30 pm on 9 May 2017 unless it was acquired under a contract entered into before this time
- => Plant and equipment acquired before 1 July 2017 but not used to earn income in either the current or previous year.

Rental expenses you cannot claim

Rental Expenses you can claim

Property Depreciation Link

Income and Expenses from		Property 1 \$	Property 2 \$	Property 3 \$
Rent Received for the year [[Gross]			
Expenses:			·	
Interest				
Bank fees				
Council Rates				
Water Rates				
Agents Commission				
Strata levies Repairs & maint	(*Please provide breakdown below)			
	(Please provide breakdown below)			
nsurance				
Borrowing costs Land Tax				
Gardening/Lawn Mowing				
Other: Please detail				
other riouss detail				
Other: Please detail				
	ment announced that from 1 July 2017 a rent for a rental property will be disallow		relating to inspection	ng,
Other: Please detail On 9 May 2017, the Governi	rent for a rental property will be disallow		relating to inspection	ng,
Other: Please detail On 9 May 2017, the Governi maintaining, or collecting r Assets Purchased [Greater	rent for a rental property will be disallow		relating to inspection	ng,
Other: Please detail On 9 May 2017, the Governi maintaining, or collecting r Assets Purchased [Greater	than \$300]: scription Cost & Date of Purchase		relating to inspection	ng, Cost
Other: Please detail On 9 May 2017, the Governi maintaining, or collecting r Assets Purchased [Greater Please provide Asset[s] Des	than \$300]: scription Cost & Date of Purchase	ved	relating to inspection	
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Other: Please detail On 9 May 2017, the Governi maintaining, or collecting r Assets Purchased [Greater Please provide Asset[s] Des	than \$300]: scription Cost & Date of Purchase	ved	relating to inspection	

Please provide a break down of repairs and maintenance expense items:

Date	Item	Cost

^{*} Note: if the repairs were done before the property rented out, it cannot claim as deduction. TR 97/23

If YES - Provide details				
Make of Motor Vehicle:				
Model of Motor Vehicle:				
Registration Number: Set Rate for 5000KM [max]	720			
Cost of Car	\$	Date of purchase	1	1
If traded in for new car: Tra	ade in amount :	Date of purchase	\$	
and the second s			*	
What is the reason for your TRAVEL BETWEEN HOME				
Did you Keep a log book fo	or the year? [Must have	been kept for a 12 week p	eriod]	
If YES - Please provide B	USINESS USE %	E	Business	%:
AND please provide FU	LL amount and we w	ill adjust for the busine	ess %	
Fuel				\$
Repairs & maintenance				\$
Registration				\$
Insurance				\$
Lease/Hire purchase [please	provide documents for hi	is claim]		\$
Car Wash				\$
Interest on loan [please prov	ide loan statements]			\$
If NO LOCBOOK 1		umana alaman in 11		
If NO LOGBOOK, but to		irposes, piease provide		Marta Transla
NO. OF KM's TRAVELLED	(max of 5,000 k's)			Km's Travelled:
Did you incur any Work Re If YES - Please provide deta	lated Travel Expenses d ails	luring the year?	<u>der se</u>	<u>ction D2 - D15*****</u>
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Did you use your car for work during the year?

or to open up a new income-earning activity.

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D5	-	Related Expenses as an EMPLOY ails - Show 100% of expense we		ISE	
	Briefcase	•			
	Computer supplies			\$	_
	Professional Association fee	s/Union fees		\$	New: Please note theATO has introduced a
	Tools			\$	new "safe harbour" for a
	Newspapers/Magazines/Jour	nals/Books		\$	maximum claim of \$50 for phone expenses. if
	Stationery			\$	you use phone for your
	Software [if <\$300, otherwise	e depreciated, list asset below]		\$	work and the expense is incidental, the ATO will
	<u>-</u>	· · · · · · · · · · · · · · · · · · ·		\$	allow a claim based on
				\$	the following rates: \$0.25
				\$	TOF WORK CARS FROM
				*	_
	Due to the complex nature	of work from home claims. Please	see below:		
	Number of hours worked from	n Home			_
	Internet -		%	\$	_
	Mobile -		%	\$	<u></u>
	Telephone -		%	\$	<u>_</u>
*		I only available up to 30th June ecline in value of capital items,			<u>NCLUDES</u>
	Working from home during COVID-19 lin	<u>IK</u>			
	Depreciation of fixed asset	s [computers etc] - Cost and date	of purchase required		
*		? [invoice, g/cert, diary etc] e office as a matter of convenience (e.g.,an endis case, no deductions can be claimed for occu			
	rates and building expenses. Deduction furniture/equipment and telephone e	tions can only be claimed for home office runni xpenses.	ing expenses, such as electricity	gas, depreciation of office	e
D7/D8	Did you have expenses related If YES - Please provide det	ating to Interest and Dividends rec	eived during the year?		
	Interest re: borrowings for sh			¢	
	Other -	ares etc		\$	_
	Otrioi			Ψ	<u> </u>
	What evidence do you have?	? [invoice, g/cert, diary etc]			
D9	Did you make any Donation	ns during the year?			
	If YES - Please provide det Must be a registered charit	ails [NOTE: cannot claim if you sta y to claim a tax deduction	and to benefit e.g. Raffle	tickets, dinners etc]
		Charity Name	Amount		
		School Building Fund	Amount		
		School Library Fund			
		School Library Fund			
D10	Did you have expenses for	Tax Agent/Tax Lodgement Fees du	uring the year?		
	If YES - Please provide am	ount	Amount	\$	
	New: for taxpayers claimed motor vehousiness kilometre limit already.	icle expenses by the cents per kilometre method	d, these kilometres should be incl	uded in the 5,000	
D12		I Superannuation Contribution and named and receive an acknowledgemen	•	tice of	
	If YES - Please provide am		Amount	\$	
	acknowledgement from the	• •	, anount	Ψ	_

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For Div 293 estimate, how much superannuation paid for the year

FMW Contact Deta	ils - New South Wales Office	
Phone:	02 8425 7888	
Street/Postal:	Level 1, Suite 3, 174 Willoughby Road	d, Crows Nest NSW 2065
FMW Contact Deta	ils - Victoria Office	
Phone:	03 9490 5666	
Street/Postal:	Level 1, Suite 6A, 50 Upper Heidelber	g Road, Ivanhoe, VIC 3079
FMW Contact Deta	ils - Queensland Office	
Phone:	07 5531 4009	
Postal	PO Box 3823, Australia Fair, QLD 421	5
Street:	Scarborough Centre, Level 1, Suite 1	06, 89 Scarborough Street, Southport Qld 4215
Email:	admin@fmw.com.au	www.fmw.com.au
Notes/Other releva	nt information:	

Did you operate a business activity during the year as a	SOLE TRADER/CONTRACTOR?
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P8 If YES - Please provide details

DO NOT COMPLETE IF A COMPANY/TRUST/PARTNERSHIP - contact us for more information required **Number of Business Activities Business Name: ABN**: **Business Activity 1: Business Activity 2: Business Activity 3:** DO NOT INCLUDE GST IN THESE AMOUNTS IF YOU HAVE LODGED A BAS CLAIMING GST PAID/RECEIVED **Business 3 Business 1** Income: **Business 2** Sales/Fees etc. Job keeper payment received; Cash boost received State government business grant received \$ Other **Expenses:** Accounting fees \$ \$ Advertising Bank fees Computer supplies [Please provide business use %'age] Home Office Running Expenses Internet fees [Please provide business use %'age] Motor vehicle [refer to Motor Vehicle Above- D1] Printing & stationery \$ Rent [Please provide business use %'age] Subscriptions Telephone - home [Please provide business use %'age] Telephone - mobile [Please provide business use %'age] **Training Courses** Travel & accommodation Superannuation Other \$ Other Other Other \$ Other \$ \$ \$ Stock on hand at 30 June: Depreciable Business Assets purchased THIS FINANCIAL YEAR Item: Date: \$ Date: Item: \$ Date: Item: Notes:



Please note - This sheet is intended to act as a guide and to prompt you to provide additional information where required to assist us in preparing your tax return. It is NOT intended to actually calculate your estimated income tax payable/[refund].

Completion of this sheet does not reduce your usual substantiation and record-keeping requirements.