



Sangelictax Sangelictax

Angelo Sangiorgi b.bus (acc) MNIA
Registered Tax Agent
PO Box 3610 Caroline Springs VIC 3023
Mobile: 0439 536 596
Email: angelo@sangelictax.com
Website: <http://www.sangelictax.com>
“ Service with a Sangelic Touch ”

Individual Tax Returns for 2008

Personal details;

Full Name :	Date of Birth :
Tax File Number :	Occupation :

Mailing Address :

Contact Numbers : Home :	Mobile:	Fax:
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Email Address :

Martial Status :	Number of Children :
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Name of Spouse	Tax File Number	Date of Birth

Please advise if your spouse is require to have his/her Income Tax Return completed

Private Health Cover Details;

Private Health Insurance	Yes / No	(if Yes please fill in following details)
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Name of Health Fund :

Type of cover : (please circle the following cover applicable) H – Hospital C – Combination A – Ancillary Number of days covered as per statement : Please note if not sure what to fill in you can provide me with copy of the statement

The contents of this worksheet are confidential to the person it is addressed to please contact sender in the event it is not received by the intended person.



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Electronic Funds Transfer (EFT):

Your Tax Refund Assessment can be directly credited to your nominated bank account please fill in the details below

BSB Number	Account Number	Account Name

Income

Payg Payment Summary (Group Certificates) from Employers

Allowances, tips commissions directors fees etc

Eligible Payment Summary Statements

Centrelink Payment Summary

ie Newstart Parenting Allowances, Government Pensions

Interest Received from Financial Institutions ie Bank

Dividends Received from Share Trading

Income received from other investments ie Cash Management Funds etc

(Please Note if you provided your Tax File Number to the bank you must declare all investment income or else you will be penalised by the ATO.

It is not an offence not to provide your TFN as you are able to claim back TFN withholding credits when your tax return is lodged.)

Share Trading Details – gains/loss on sale of shares, new purchases etc

Rental Property Income (please provide details of Property – existing and new purchases if applicable)

Income from Partnerships / Trusts Distributions etc

(please note Losses from Partnerships can be offset against any current year taxable income)

Income from Self-employment businesses etc

Income from overseas sources

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Expenses/Deductions

Work -related Expenses

(Please Note ; substantiation of you expenses is allowed ie Motor Vehicles 5000kms, however written evidence ie receipts, credit card statements is required where applicable ie expenses of more than \$300)

Motor Vehicles – 4 Types – you have the choice of the following methods

5000kms or less – based on number of kilometres travelled without the need to keep records depending on the make/model engine size of motor vehicle

If you travelled more than 5000 kms you can use the following methods;

12% of original value method – based 12% of the cost value of motor vehicle if brought outright. If leased you can claim 12% of the market value at the time it was first leased.

One-third of actual expense method – this allows you to claim one-third of your expenses, you must written evidence ie kept petrol receipts, kilometres readings and make a reasonable estimate based on those records

Logbook method – this method based on percentage usage claimed for motor vehicle expenses ie 60% work usage 40% private usage you must keep;
a logbook of kilometres travelled
written evidence of motor vehicle expenses ie repairs, registration, insurance
leasing etc.

NOTE: examples where you cannot claim for motor vehicle expenses;

- trips to and from work place
- you are on call ie on stand by
- you work outside normal hours ie shift-work overtime

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Individual Tax Returns for 2008

Expenses/Deductions contd

Motor Vehicles contd;

NOTE: examples where you can claim for motor vehicle expenses;

- carrying bulky equipment used for work and cannot leave them at work
- using your home a workplace, starting working at home and then travelling to office to continue working
- regularly attending different worksites during the workday
- travelling between two different jobs during the day can either claim for the journey leaving first job going to second job, or from second job to home, which gives the greater deduction
- travelling to and from work to attend seminars, staff training etc

Travel expenses

Self – education expenses

Uniforms/dry cleaning expenses

Other expenses such as;

- union fees
- subscriptions
- books/journals,
- telephone/fax/internet
- computer expenses
- loose tools replaced
- depreciation on equipment eg computer
- seminars/training/education
- home office etc;

Gifts/Donations

Tax Agents Fees

Income Protection Insurance

Deductions from Self-employment businesses etc

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Expenses/Deductions contd

Rental Property Deductions ie;

- Interest on Bank Loans
- Bank Fees & Charges
- Agents Commissions
- Landlord Insurance
- Gardening & Caretaking
- Legal Fees
- Electricity & Gas
- Rates & Taxes (Council Rates, Water Rates Land Tax)
- Repairs & Maintenance
- Depreciation on Capital Items ie Equipment
- Building Allowances write off etc

(if not sure what to claim please contact me)

Other Items

Taxable Losses from prior years which can be offset against current/future year taxable income

Capital Losses from prior years which can be offset against current year Capital Profits (Gains)

Personal Superannuation Contributions

Personal Superannuation Contributions made on behalf of spouse/de-facto

Superannuation Contributions for self-employed fully deductible up to \$50,000 for the year

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Other Items contd

Medical Expenses Offset – you are entitled to a 20% rebate offset, total amount must be more than \$1500.00 to claim the rebate

Capital Gain/Loss on Property/Shares etc – please ensure you have all proper records to account for sale of Property/Shares

50% Discount Option on gain of sale providing the asset was held for more than 12 months after it was disposed of

Please fill in the first page of the checklist and return it to me together with all your relevant tax records or you can scan all relevant information and email it to; angelo@sangelictax.com

Or you can refer to website; www.sangelictax.com

If you have any other tax requirements ie PAYG BAS obligations or you know someone who requires their tax returns done please let me know

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