

Tax Return Information

2024 Individual Tax Return

Please e-mail, fax or post this form back to our office:

TO: HHH Partners
ATTENTION:

FAX: (07) 4983 9909
E-MAIL: accountants@hhhpartners.com.au

| | | | |
|--------------|--|-------------------|---|
| CLIENT NAME: | | CLIENT SIGNATURE: | X |
|--------------|--|-------------------|---|

INFORMATION FOR 2024 TAX RETURN

| | | | |
|-----------------------|-----------|-----------------|-------------|
| Name: | | Spouse Name: | |
| DOB: | | Spouse DOB: | |
| Address: | | Postal Address: | |
| TFN: | | Email: | |
| Bank Account Details: | A/c name: | BSB: | A/c number: |
| Phone: | W | H | M |

CHILDREN

| | | | |
|---------|-------------------|---------|-------------------|
| Name: | | Name: | |
| DOB: | | DOB: | |
| School: | Primary/Secondary | School: | Primary/Secondary |
| Name: | | Name: | |
| DOB: | | DOB: | |
| School: | Primary/Secondary | School: | Primary/Secondary |

PAYG PAYMENT SUMMARIES (Please Attach All Summaries)

| Employer: | Occupation: | Gross: | Tax: |
|-----------|-------------|--------|------|
| | | \$ | \$ |
| | | \$ | \$ |

BANK INTEREST

| Bank: | Amount: | TFN Credits: | Bank Charges: |
|-------|---------|--------------|---------------|
| | \$ | | |
| | \$ | | |

WORK EXPENSES (Please Attach Detailed Listing)

| | | | |
|---------------------|----|--------------------|-----------------------|
| Motor Vehicle Type: | | Self Education: | \$ |
| Engine Size: | | Seminars/Prof Dev: | \$ |
| Work Kilometres: | | Stationery: | \$ |
| Taxi Fares: | \$ | Uniform: | \$ |
| Other Travel: | \$ | Union Fees: | \$ |
| Reference Books: | \$ | Other Expenses: | Please Attach Details |

PRIVATE HEALTH INSURANCE

| | | | |
|--|--|----------------|---------|
| Fund Name: | | Type of Cover: | |
| Membership No: | | Days Covered: | Excess: |
| Tax Statement Attached? <input type="checkbox"/> Yes <input type="checkbox"/> No | | | |

DO YOU HAVE ANY OF THESE ITEMS?

(If so, then please download additional forms from www.hhhpartners.com.au)

- Investment Income Rental Properties
 Investments Sold Motor Vehicles used for Work