

Tax Return Information Form



Lindbeck
partners

2013 Individual Tax Return

Please e-mail, fax or post this form back to our office **PRIOR** to your appointment:

TO: Lindbeck Partners

FAX: (02) 4954 5757

E-MAIL: mail@lindbeckpartners.com

CLIENT NAME:		CLIENT SIGNATURE:	
INFORMATION FOR 2013 TAX RETURN (1 July 2012 to 30 June 2013)			
Name:		Spouse Name:	
DOB:		Spouse DOB:	
Residential Address:		Postal Address:	
TFN:	Email:		
Phone:	W	H	M
BANK DETAILS (as of 1 July 2013, if you are expecting a refund, you MUST provide the ATO your EFT Bank Details)			
Account Name:		Bank Name:	
BSB:		Account No.:	
CHILDREN			
Name:		Name:	
DOB:		DOB:	
Name:		Name:	
DOB:		DOB:	
PAYG PAYMENT SUMMARIES (Please Attach, Fax or Email All Slips)			
Employer:	Occupation:	Gross:	Tax:
		\$	\$
		\$	\$
		\$	\$
BANK INTEREST			
Bank:	Amount:	TFN Credits:	Bank Charges:
	\$		
	\$		
WORK & OTHER EXPENSES (Please Attach, Fax or Email Detailed Listing)			
Motor Vehicle Type:		Reference Books:	\$
Engine Size (litres):		Stationery:	\$
Work Kilometres:		Mobile Phone:	\$
Taxi Fares:	\$	Internet:	\$
Other Travel:	\$	Memberships:	\$
Uniform/Laundry:	\$	Tools & Equipment:	\$
Sun Protection Items:	\$	Interest expenses:	\$
Self-Education:	\$	Gifts & Donations:	\$
Union Fees:	\$	Income Protection Insurance:	\$
Seminars/Prof Development:	\$	Other Expenses:	Please Attach Details
PRIVATE HEALTH INSURANCE			
Fund Name:		Type of Cover:	
Membership No:		Days Covered:	Excess:
Rebate Claimed?	<input type="checkbox"/> Yes <input type="checkbox"/> No	Out-of-pocket Medical Expenses:	\$
If Yes What %	<input type="checkbox"/> 10% <input type="checkbox"/> 15% <input type="checkbox"/> 20%	<input type="checkbox"/> 25% <input type="checkbox"/> 30% <input type="checkbox"/> 35% <input type="checkbox"/> 40%	
DO YOU HAVE ANY OF THESE ITEMS? (If so, then please download additional forms from www.lindbeckpartners.com)		<input type="checkbox"/> Investment Income <input type="checkbox"/> Rental Properties <input type="checkbox"/> Investments Sold <input type="checkbox"/> Motor Vehicles used for Work	