



COMPLETE SYSTEM
CONSULTING

CLIENT RESPONSE

Individual Income Tax Return



THE ACCOUNTING
ACADEMY

Prepared from the client's Microsoft Forms submission. Review every response and supporting document before signing.

Client name		Income year	
Response ID		Submitted	

TFN protection: The client's tax file number is collected separately and is not displayed in this response document.

SECTION 01 | PERSONAL DETAILS

Question / information	Client response
Full legal name	
Preferred name	
Date of birth	
Gender (optional)	
Country of birth	
Country of citizenship	
Occupation / job title	
Employer name	

SECTION 02 | CONTACT AND ADDRESS DETAILS

Question / information	Client response
Residential address	
Suburb / town	
State	
Postcode	
Postal address (if different)	
Email address	
Mobile phone	
Home phone	
Work phone	

SECTION 03 | RESIDENCY AND VISA STATUS

Question / information	Client response
Australian resident for tax purposes?	
Resident in Australia for the full income year?	
Arrival / departure dates (if applicable)	
Periods of foreign residency during the year?	
Foreign residency country / dates	
Visa held other than citizenship / permanent residency?	
Visa subclass	
Foreign income or assets during the year?	

SECTION 04 | SPOUSE AND FAMILY DETAILS

Question / information	Client response
Spouse (married or de facto) during the year?	
Spouse full name	
Spouse date of birth	
Spouse TFN supplied separately?	
Spouse estimated taxable income	
Spouse residency status	
Relationship status changed during the year?	
Date of change	
Dependent children during the year?	
Number of dependent children	
Paid or received child support?	
Eligible for family tax benefit?	

SECTION 05 | INCOME

Employment income

Question / information	Client response
Salary or wages from employment?	
Employer name(s)	
More than one employer during the year?	
Employer allowances (car, travel, uniform, etc.)?	
Reportable fringe benefits?	
Reportable employer super contributions (RESC)?	
Lump sum payments (redundancy, ETP, unused leave)?	

Government payments

Question / information	Client response
Centrelink / Services Australia payments?	
Government payment type	
Age Pension or Disability Support Pension?	
Youth Allowance, Austudy or ABSTUDY?	
Pandemic / disaster relief payments?	
Other government payments?	
Other government payment details	

Investment income

Question / information	Client response
Interest from bank accounts or term deposits?	
Dividends from Australian shares?	
Australian dividend companies	
Dividends from foreign shares?	
Trust distributions?	
Rental income from Australian property?	
Rental income from foreign property?	
Income from a partnership?	

SECTION 05 | INCOME - CONTINUED

Business income

Question / information	Client response
Business income as a sole trader?	
Business partnership income?	
Business activity statement (BAS) obligation?	
Business registered for GST?	

Capital gains

Question / information	Client response
Sold, transferred or disposed of assets?	
Asset type	
Sold shares, units or managed-fund investments?	
Sold real property?	
Distributions including a capital gain?	
Carried-forward capital losses?	

Superannuation and other income

Question / information	Client response
Super lump sum or pension payments?	
Personal after-tax super contributions?	
Government super co-contribution?	
Spouse super contribution?	
Foreign income?	
Income from a deceased estate?	
Royalties?	
Compensation or insurance proceeds?	
Other income not listed?	
Other income details	

SECTION 06 | DEDUCTIONS AND EXPENSES

Work-related expenses

Question / information	Client response
Work-related clothing, uniform or protective equipment?	
Laundry or dry-cleaning of work clothing?	
Self-education, training or CPD courses?	
Professional memberships, union or licence fees?	
Work-related phone expenses?	
Estimated phone work-use percentage	
Work-related internet expenses?	
Estimated internet work-use percentage	
Working-from-home expenses?	
Working-from-home method	
Tools, equipment or technology?	
Stationery or office supplies?	
Vehicle / car expenses?	
Vehicle claim method	
Overnight travel or accommodation?	
Income protection insurance premiums?	
Overtime meal expenses?	
Other work-related expenses?	
Other work-related expense details	

SECTION 06 | DEDUCTIONS AND EXPENSES - CONTINUED

Investment, rental and other deductions

Question / information	Client response
Interest on investment loans?	
Investment account-keeping or management fees?	
Brokerage or financial adviser fees?	
Rental property expenses?	
Depreciation on rental / investment assets?	
Interest on rental property loan?	
Body corporate fees?	
Capital works deductions (Division 43)?	
Charitable donations to DGR-endorsed organisations?	
Gifts of property or financial assets to a DGR?	
Cost of managing tax affairs?	
Personal super contributions claimed as a deduction?	
Low income super tax offset contributions?	
Other deductions?	
Other deduction details	

SECTION 07 | TAX OFFSETS AND REBATES

Question / information	Client response
Private health insurance hospital cover during the year?	
Health fund name	
Hospital cover for the full income year?	
Private health insurance rebate tier changed?	
Eligible for seniors and pensioners tax offset (SAPTO)?	
Zone or overseas forces tax offset?	
Zone	
Eligible for beneficiary tax offset?	
Early-stage investment in a qualifying startup?	
Spouse contribution to super for low-income spouse?	
Eligible for low income tax offset (LITO)?	

SECTION 08 | STUDENT LOANS AND MEDICARE

Question / information	Client response
HECS-HELP debt?	
VET Student Loan (VSL) debt?	
HELP / SSL / ABSTUDY SSL debt?	
Medicare Levy exemption during the year?	
Medicare Levy exemption reason	
Medicare Levy Surcharge exemption certificate?	
Appropriate private hospital cover to avoid MLS?	

SECTION 09 | ASSETS AND DEPRECIATION

Question / information	Client response
Depreciating assets used for work or investment?	
New assets costing \$300 or more?	
Existing asset register from a prior year?	
Assets disposed of, sold or written off?	
Asset details (description, purchase date, cost, work use, method, notes)	

SECTION 10 | RENTAL PROPERTY

Question / information	Client response
Owned a rental property during the year?	
Property available for rent for the full year?	
Property used for private purposes?	
Number of private-use days	
Rented to family or friends below market rate?	
Purchased or sold a rental property?	
Property part of a strata / body corporate?	
Rental property details (address, dates, income, agent, ownership %, loan balance)	

SECTION 11 | FOREIGN INCOME AND ASSETS

Question / information	Client response
Income from a foreign source?	
Country	
Foreign tax paid?	
Foreign tax amount (AUD)	
Foreign assets over \$50,000 AUD?	
Interest in a foreign trust or controlled foreign company?	
Transferred money to or from a foreign account?	
Foreign pension or retirement accounts?	

SECTION 12 | BANK ACCOUNT DETAILS FOR ATO REFUND

Question / information	Client response
Account holder name	
BSB	
Account number	
Financial institution	

SECTION 13 | PRIOR YEAR AND OTHER INFORMATION

Question / information	Client response
Prior-year return prepared by a different agent?	
Prior agent name	
Copy of prior-year notice of assessment?	
Carried-forward tax losses?	
Carried-forward capital losses?	
ATO contact about prior-year returns?	
Outstanding ATO debts or payment arrangements?	
Audited or reviewed by the ATO?	
Disputes or objections lodged with the ATO?	
Circumstances changed significantly from last year?	
Change details	

SECTION 14 | CLIENT DECLARATION

I declare that the information in this response document and in any supporting documents is true and correct to the best of my knowledge. I understand that providing false or misleading information to a tax agent may constitute an offence under taxation law.

Client full name	Date
Signature 	Review reference
Practitioner notes	Supporting documents received
Tax services are provided on behalf of and under the supervision and control of The Accounting Academy Services Pty Ltd, Registered Tax Agent No. 26233096.	

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