

## FAJ TAX TIME WORKSHEET

|                                     |                                    |                       |
|-------------------------------------|------------------------------------|-----------------------|
| Client Name _____                   | Number of dependant children _____ |                       |
| Bank account details for tax refund | Dependant name/s _____             | Date/s of birth _____ |
| BSB _____ Account number _____      | _____                              | _____                 |
| Spouse/de facto partner details     | _____                              | _____                 |
| Name _____                          | _____                              | _____                 |
| Date of birth _____                 | _____                              | _____                 |
| Taxable income _____                | _____                              | _____                 |

### Work Related Deductions

If an item of expenditure is directly related to your current employment, you were not reimbursed and you have a record to prove the expense, you may be able to claim it as a tax deduction. If the expense was both work-related and private, you can only claim a deduction for the work-related portion.

| Other work-related expenses    |    |
|--------------------------------|----|
| Telephone/mobile phone         | \$ |
| Work use portion of mobile     | %  |
| Internet                       | \$ |
| Work use portion of internet   | %  |
| Home office use hours per week |    |
| Stationery                     | \$ |
| Courses and seminars           | \$ |
| Union fees                     | \$ |
| Subscriptions                  | \$ |
| Licence & association fees     | \$ |
| Tools of trade/equipment       | \$ |
| Repairs of equipment           | \$ |
| Computer equipment & software  | \$ |
| Sun protection                 | \$ |
| Books & trade journals         | \$ |
| Purchase of assets over \$300* | \$ |
| Date purchased                 |    |
| Portion used for work          | %  |
| Donations                      | \$ |
| Income protection insurance    | \$ |
| Personal super contributions   | \$ |
| Interest & dividend expenses   | \$ |
| Last year's accounting fee     | \$ |
| Other                          | \$ |

\*e.g. mobile, computer, tools

| Work-related clothing & laundry expenses  |    |
|---|----|
| Work uniforms                             | \$ |
| Protective clothing & safety gear         | \$ |
| Car expenses (log book method)            |    |
| Fuel                                      | \$ |
| Insurance                                 | \$ |
| Interest or leasing charges               | \$ |
| Registration                              | \$ |
| Repairs and servicing costs               | \$ |
| Other                                     | \$ |
| Log book work use percentage              | %  |
| Car expenses (cents per kilometre method) |    |
| Kilometres travelled*                     |    |
| Work-related travel expenses              |    |
| Flights                                   | \$ |
| Travel costs e.g. uber fares              | \$ |
| Accommodation                             | \$ |
| Meals                                     | \$ |
| Other                                     | \$ |
| Private portion of travel                 | %  |
| Self-education expenses                   |    |
| Course fees                               | \$ |
| Kms travel between work & study           |    |
| Books                                     | \$ |
| Stationery                                | \$ |

\*excluding to and from work

| Rental Property Information        |    |
|------------------------------------|----|
| Address                            |    |
| Number of weeks available for rent |    |
| Date property first earned income  |    |
| Ownership                          | %  |
| Rental Property Expenses           |    |
| Advertising                        | \$ |
| Body corporate fees                | \$ |
| Borrowing expenses                 | \$ |
| Cleaning                           | \$ |
| Council rates                      | \$ |
| Gardening/lawn mowing              | \$ |
| Insurance                          | \$ |
| Interest                           | \$ |
| Land tax                           | \$ |
| Legal fees                         | \$ |
| Pest control                       | \$ |
| Property agent fees/commission     | \$ |
| Repairs & maintenance*             | \$ |
| Stationery, telephone & postage    | \$ |
| Water charges                      | \$ |
| Other expenses                     | \$ |

\*(please include invoices)

#### Note

- Please provide us with a copy of your property depreciation report.
- If you haven't obtained a depreciation report please ask your accountant to determine if it's worthwhile for your property.

If you have more than one rental property please copy this page.

| Depreciable assets purchased over \$300 |    |
|---|----|
| Item                                    |    |
| Date                                    | \$ |
| Item                                    |    |
| Date                                    | \$ |
| Item                                    |    |
| Date                                    | \$ |
| Item                                    |    |
| Date                                    | \$ |
| Property improvements                   |    |
| Item                                    |    |
| Date                                    | \$ |
| Item                                    |    |
| Date                                    | \$ |
| Item                                    |    |
| Date                                    | \$ |
| Item                                    |    |
| Date                                    | \$ |
| Item                                    |    |
| Date                                    | \$ |

#### Useful records

- Income & expenses from business activities.
- Foreign source income (interest on overseas bank accounts, foreign pensions).
- Details of rental property income (agent statement).
- Investment purchase / sale statements (shares, property).
- Documentary evidence for all deductions & expenses (receipts, log books, itemised summaries).



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TAX RETURNS



TAX TOOLS APP

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This handout contains information that is general in nature based on current taxation laws. You should not rely on this information without seeking your own independent advice.

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