



Level 1, 50-58 Moorabool Street, Geelong, Victoria 3220
Telephone 5222 2049 Facsimile 5221 2362 Email gts@geelongtaxservices.com.au

2014 Tax year

Dear Client,

I am pleased to be able to take this opportunity to introduce or reacquaint you with our staff who will be involved in the process of your 2014 Tax Return submission; Jeanette Nielsen (Reception), John Faulkner (Accountant), Jarrod Lundie (Accountant), Jim Turner (Accountant) and myself, Paul Madden (Accountant).



To assist with the preparation of your individual tax return this year please refer to the back of this page. Please complete the questionnaire (over page) and you can either bring this along to your interview or send the information directly to us via post or email.

For Business, Rental Investors and Superannuation Funds, please download and complete the appropriate checklist at www.geelongtaxservices.com.au

Too busy for an appointment? You may send details to us by email at gts@geelongtaxservices.com.au or post to Level 1, 50-58 Moorabool Street, Geelong Vic 3220.

Yours faithfully,

A handwritten signature in black ink that reads "Paul J. Madden".

Paul Madden CPA

INDIVIDUAL TAX QUESTIONNAIRE FOR 30th JUNE 2014

1. Are you a new Client? ****please circle where appropriate**** Yes No

Income

- | | | |
|--|-----|----|
| 2. Have you received income from Employment or Self-Employment? | Yes | No |
| 3. Have you received any Government Benefit or Pension? | Yes | No |
| 4. Have you received any Interest or Dividend? | Yes | No |
| 5. Have you received money from a Trust, Partnership or Managed Fund? | Yes | No |
| 6. Do you own a Rental Property? | Yes | No |
| 7. Have you received any income from overseas? | Yes | No |
| 8. Have you sold or disposed of any capital assets (eg. Shares or Property)? | Yes | No |
| 9. Have you received income from any other sources? | Yes | No |

Expenses

- | | | |
|---|-----|----|
| 10. Do you have a claim for work related self-education or training? | Yes | No |
| 11. Have you used your own vehicle for work or business (Klm travelled)? | Yes | No |
| 12. Have you incurred any work related expenses that were not reimbursed? | Yes | No |
| 13. Have you paid interest on loans relating to an investment? | Yes | No |
| 14. Have you made any gifts or donations to charitable institutions? | Yes | No |
| 15. Have you paid any income protection insurance premiums? | Yes | No |

Tax Rebates

- | | | |
|---|-----|----|
| 16. Have you paid premiums to a private health insurance fund? | Yes | No |
| 17. Has your marital status changed this year? | Yes | No |
| 18. Do you have any dependants? | Yes | No |
| 19. Have you made any superannuation contributions for yourself or spouse? | Yes | No |
| 20. Have you spent time on a remote location for work? | Yes | No |
| 21. Have you incurred more than \$2000 out of pocket medical related items? | Yes | No |

Other

- | | | |
|--|-----|----|
| 22. Is there any other information we should be aware of? | Yes | No |
| 23. Have there been any changes to your name, address or occupation? | Yes | No |
| 24. Notes- Other items to discuss? | | |

*** Please provide supporting documentation on any question you answered "YES" to/and any other paperwork that you might think needs further discussion**