Client details form 2020 individual income tax return

Full Name	
Tax File Number	
Date of birth	
ABN (if applicable)	
Address	
Address (postal) (Put 'as above' if the same)	
Telephone contacts	Mobile:
	Business Hours (work) :
	After Hours (home):
Email	
Electronic banking Details	BSB:
(for refund if applicable)	Account Number:
Occupation	
Occupation	
Occupation	Do you run your own business as a sole trader?
Occupation	Do you run your own business as a sole trader? YES/NO
Occupation	

Spouse's full name	
(Please include married/de facto/same-sex)	
Spouse's date of birth	
Spouse's TFN	
Approximate Income (if known)	

Client details form continued ...

1. Do you have any dependants (children up to the age of 21, full time students under the age of 25, parents or parents in law) living with you?

YES/NO.....If YES, please provide short summary of the details below:

FULL NAME	DATE OF BIRTH
1.	
2.	
3.	
4.	

^{2.} Have you had a change in marital status during the income year? (Please circle)

YES / NO

3. Have you had a change in occupation or started a new job during the income year? (Please circle)

YES / NO

4. Have you had a change of address during the income year? (Please circle)

YES / NO

5. Did you buy or sell any property during the income year? (Please circle) (e.g., shares, rental property, main residence)

YES/NO.....If YES, please provide short summary of the details below:

Type of asset (e.g., shares/ holiday home)	Date acquired (approx)	Price sold for (approx)

6. Was last year's return prepared by a registered tax agent (other than our firm)

YES/NOIf YES, please provide short summary of the details below:

FIRM NAME and contact	
FIRM address	
Details of work done	

Client details form continued ...

7. Where relevant, please provide details of the following types of income:

Details of salary and wages

Please provide all Income statements applicable to the 2020 income year.

Where you have not been provided with either an employment income statement (available via your MyGov account) or PAYG payment summary (if provided to you from your employer where they have not reported your payment details to the ATO electronically via STP), please provide details of any relevant salary and wages (and any other similar payments) below:

Main occupation	
Payer's ABN	
Tax Withheld: \$	Gross Payment: \$

Main occupation	
Payer's ABN	
Tax Withheld: \$	Gross Payment: \$

Main occupation	
Payer's ABN	
Tax Withheld: \$	Gross Payment: \$

Details of interest received

Bank	Branch	Account number	Amount	Joint names?

Details of dividends received (or reinvested on your behalf)

Company	Date Paid	Unfranked dividends	Franked dividends	Franking credits	TFN Amount

Details of cash management trust distributions received

Amount	Franking credits	Trustee tax	TFN amount	Net capital gains	Other

Details of rental income received

Address	
Rent received	
Weeks rented	

Address	
Rent received	
Weeks rented	

Address	
Rent received	
Weeks rented	