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**For office use only:**

**Client ID:………………….**

***Accountants, Tax Agents & Business Advisors***403/434 St Kilda Road, Melbourne 3004, Australia

**Ph :( 03)99437220**

**Email:info@honestandyoung.com.au**

**Individual Tax Interview Check List-2021 Income Tax Return (online only)**

1.Title (Mr/Mrs/Ms/Dr/Other):(**For new clients only**: One copy of photo ID is required: D/L or Passport)

Surname:

First name:

Other names, if any:

2. TFN(**for new clients only**):

(Your TFN will be used only forgetting pre-filled information from ATO tax portal and lodgment of your income tax return with the ATO. Quoting your TFN is not mandatory as per law. If someone chooses not to provide us with TFN, we may be unable to provide our services.)

3. Date of Birth:

4. Address: Residential:

Postal:

5. Phone:

6. Email:

7. Occupation:

8. Bank Account details for refund

BSB: A/c No: A/c Holder Name:

9.Have you done your last year tax return: Please send copy of tax return for the previous year?

(**Applicable only for new clients)**

**10. Name of Spouse/De-facto (if any):**

**11. Date of Birth of Spouse/ De-facto (if any):**

1**2. If married/ de-facto from 1st July 2019 to 30th June 2020 when did it occur:**

**13. Spouse taxable income for 2020 financial year:**

**14. What is your residency status (PR, Citizen, Work Visa, NZ Citizen-please specify):**

**15. Are you entitled to the Medicare levy exemption(Y/N)?**

**16. Are you Australian Resident for Tax Purposes(Y/N)?**

**18. If you arrived in Australia during July 2019 to June 2020 (please specify date of arrival):**

**19. If you left Australia during July 2019 to June 2020 whether permanently or temporarily**

(Please specify date of departure):

**20. Do you have foreign assets worth more than AUD $50000 - (Y/N):**

**21. Do you have any investment property in Australia or overseas: (Y/N):**

(If ‘YES’, please email us at [info@honestandyoung.com.au](mailto:info@honestandyoung.com.au) for investment property checklist)

(Only for new clients)

**22. Any brought forward capital or revenue losses from previous year:**

(Only for new clients)

**23. Any HELP/HECS Dues:**

**Note:** For engagement terms &conditions and privacy policy, please visit our website: **www.honestandyoung.com.au**

<http://www.honestandyoung.com.au/assets/sitesfile/file/terms-engagement.pdf>