

# Individual Tax return

**Thanks for reaching out to us.** Please provide us the information listed below. Please answer questions only relating to you. We will prepare your tax return once we receive it. You can download it and Email to us the information: [axetax.mia@gmail.com](mailto:axetax.mia@gmail.com)

You will receive the lodgement once it is finished (normally same day we received or next following day)

**1. Full name**

**2. DOB**

**3. Tax file No.**

**4. Contact details**

- phone number
- Address

**5. Income** (summary or last payslip (30/06/2023) if you have one)

**6. what is your job title, in what industry?**

**7. Partner or spouse details** (if you have)

- name
- DOB
- income

**8. How many children do you have and at what age?** (for medicare levy purposes)

**9. Private health insurance** (covered hospital bed) if you have

- Which insurer
- Membership No.
- Annual fee

**10. Expenses** (if you have spent on your work-related expenses)

Please list each amount spent and the purpose of each item.

**11. Any other income?**

# Business income(sole trader), Please provide us

- Income & expenses
- bookkeeping record or record of income & expenses

# investment property rental income? if yes, please provide information below.

- Purchase Date, price, ownership? who owned, please name and %
- Real Estate agent financial report
- any other rental expenses?

# share, crypto currency

- Please provide us end of financial year statement from investment company

**12. Are you a permanent residency here, or what visa are you currently holding?**

- how many months in Australia?

**13. Bank details for any tax refund**

- Name
- BSB
- ACC
- which Bank

**14. Your Photo ID** - driver license or passport, or ID card etc( can take photo with phone)