

DIGITAL TAX RETURN



Brought to You by Rapport Taxation Services

TAXPAYER DETAILS

TFN	
Title	
Given Names	
Surname	
Postal Address	
Residential Address	
Date of Birth	
Contact Number	
Email Address	
Occupation	

Only Change Where Necessary

Would you like to receive a copy of your tax return / tax estimate by email? Yes No

Sign where indicated. The return will only be lodged after your final approval.

PART A Electronic Lodgement Declaration (Form I)

This declaration is to be completed where a taxpayer elects to use the Electronic Lodgement Service. It is the responsibility of the taxpayer to retain this declaration for a period of five years after the declaration is made; penalties may apply for failure to do so.

Privacy

The ATO is authorised by the Taxation Administration Act 1953 to request your tax file number (TFN). We will use your TFN to identify you in our records. It is not an offence not to provide your TFN. However, you cannot lodge your income tax form electronically if you do not quote your TFN. Taxation law authorises the ATO to collect information and to disclose it to other government agencies. For information about your privacy go to ato.gov.au/privacy.

Electronic Funds Transfer - Direct Debit

Where you have requested an EFT direct debit some of your details will be provided to your financial institution and the Tax Office's sponsor bank to facilitate the payment of your taxation liability from your nominated account.

Tax file number (TFN):

Year:

Name

Declaration

I declare that

- The information provided to my registered tax agent for the preparation of this tax return, including any applicable schedules is true and correct, and
- The agent is authorised to lodge this tax return.

Important: The tax law imposes heavy penalties for giving false or misleading information.

Signature x

Date

PART B Electronic funds transfer consent

This declaration is to be completed when an electronic funds transfer (EFT) of a refund is requested and the tax return is being lodged through the electronic lodgement service (ELS). The declaration must be signed by the taxpayer prior to the EFT details being transmitted to the Tax Office. If you elect for an EFT, all details below must be completed. Important: Care should be taken when completing EFT details as the payment of any refund, including any family tax benefit, will be made to the account specified.

Agent's reference number 72258-003

Account Name:

I authorise the refund to be deposited directly to the specified account as above.

Signature x

Date

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Digital Tax Return Check List

Access by our office to your Pre-filing Report has eased the burden of laboriously completing an all-inclusive checklist! It is now a matter of completing an exception list of items that have not been already collated by the ATO. Note that there can sometimes be a time delay in cross reporting by institutions to the ATO.

1. PAYGW (group certificate) summaries are generally 90 – 95% reported by end July. Some small employers may be later.
2. Interest income is usually fully reported by end July. The only exception is likely to be trust distributions from deposit bonds and solicitors trust accounts.
3. Dividend income, especially locally listed companies, are prompt provided your TFN has been quoted.
4. Employee Share Schemes by end July.
5. Foreign income is often not reported so please advise us directly.
6. Trust/Managed fund distributions are slow to report. Usually from September onwards.
7. Donations (must be to a Tax-deductible registered recipient), as always, you need to advise us directly.
- 8 + 9. Student loans and Private Health fund private hospital cover, prompt and reliable.
10. Capital gains and losses – limited cross reporting and you need to advise us directly
11. Rental properties – the best sources are your estate agent's rental summary, the mortgage loan account summary and your personal record of items paid directly by yourself.
- 12 & 13. Your spouse's name and number of children should already be known to us.

PAYMENT METHODS

Please tick one of the boxes below.

I have attached my cheque (Please consult Rapport on 02-95800030 for fee) _____

I authorise you to debit my credit/debit card (details below)

I authorise fee from refund payment _____

(Note: **FFR charge of \$15, terms and conditions apply**)

SIGNED: _____ DATED: _____

I wish to pay by Amex/MasterCard/Visa (Circle type of card)

Name on Card: _____

Card number: ____/____/____/____ Expiry date: ____/____

CCV: ____