

## INCOME TAX WORKSHEET

### TAXPAYER DETAILS

Title		Tax File Number	
Surname		Date of Birth	
First Name		Best Contact Number	
Other Name/s			
Occupation (not Title)			
Residential Address			
Suburb			
State		Postcode	
E-mail Address			
Spouse (Full Name)		Date of Birth	Tax File Number
			Taxable Income

(Note: If we do not prepare your spouse's tax return we may require additional information and will contact you if required.)

Dependent Children (Full Name) under 25 years	Date of Birth	Tax File Number	Taxable Income

### TAX REFUND BY ELECTRONIC FUNDS TRANSFER (EFT) - THE ATO DOES NOT ISSUE CHEQUES

BSB Number (6 digits)	-	Account Number	
Account Name			

#### AUTHORITY / PRIVACY DECLARATION

Please note: We are unable to prepare income tax returns for clients who have not completed this authority

I hereby authorise PRECISION ACCOUNTING & TAX to prepare my income tax return for the year ended 30<sup>th</sup> June from the information that I have supplied and in accordance with my instructions. For this engagement I agree to the basis of your fees as set out below. I have read the Personal Income Worksheet that applies to my Income Tax Return. I also authorise the obtaining or verification of tax-related details from my financial advisor and/or my financial institutions should this be required for the purpose of preparing my income tax return.

Signature .....

#### TERMS OF ENGAGEMENT

Our Terms of Engagement are detailed on our website at <https://www.precisiontaxaccounting.com.au>. You are encouraged to read this before signing. I confirm that I agree with the Terms of Engagement as outlined in the PRECISION Terms of Engagement Brochure.

Signature .....

Date .....

#### PREFERRED METHOD OF RECEIVING TAX RETURN & DOCUMENTS FOR SIGNING (please tick):

- Mail
  Email (note security not guaranteed)
  Docusign - (password protected)