



**Hetherington+Associates**  
Chartered Accountants

ABN 34 712 056 289

Phone  
Fax  
Email

Suite 6, 61 Commercial Drive  
SHAILER PARK Qld 4128  
PO Box 3592  
LOGANHOLME QLD 4129  
**07 3209 7092**  
07 3209 7048  
brett@hafs.com.au

In order to complete your request to vary your PAYGW tax in relation to the loss on your investment property we need to request the following information from you (and your partner if the property is owned jointly).

**Please complete if new client or if details have changed:**

1. Full name(s) (a).....

TFN: .....

D.O.B.....

(b).....

TFN: .....

D.O.B.....

2. Postal/Home Address .....  
.....  
.....

Do you have a spouse (not included in this property) .....

Their estimated annual taxable income \$.....

**IMPORTANT INFORMATION**

This e-mail and any attachments transmitted with it are confidential and should be read only by those persons to whom it is addressed. It may contain sensitive and private proprietary or legally privileged information. No confidentiality or privilege is waived or lost by any mistransmission. If you are not the intended recipient, please immediately destroy it and notify the sender. You must not, directly or indirectly, use, disclose, distribute, print, or copy any part of this e-mail if you are not the intended recipient.

3. Phone No.'s including work and mobile

(a) H: .....

W: .....

M: .....

e-mail: .....

(b) H: .....

W: .....

M: .....

e-mail: .....

4. Occupation(s)

(a).....

(b).....

5. Please estimate your gross wages (all employers) for **2016** including allowances and bonuses.

(a).....

(b).....

**Please also supply your latest payslip**

**Please Note:** If you have changed employers during the year please supply your final payslip from your previous employer.

---

**IMPORTANT INFORMATION**

This e-mail and any attachments transmitted with it are confidential and should be read only by those persons to whom it is addressed. It may contain sensitive and private proprietary or legally privileged information. No confidentiality or privilege is waived or lost by any mistransmission. If you are not the intended recipient, please immediately destroy it and notify the sender. You must not, directly or indirectly, use, disclose, distribute, print, or copy any part of this e-mail if you are not the intended recipient.

6. Will you have any other income on your tax return this year eg interest, dividends, bonuses, termination payments, foreign income, capital gains, pensions? (give details)

Income	.....	Amount	\$ .....
	.....		\$ .....
	.....		\$.....

**Additional income information required for 2016**

7. Do you have any foreign employment income?

(a) \$ .....

(b) \$ .....

8. Do you have any exempt foreign employment income?

(a) \$ .....

(b) \$ .....

9. Do you have any reportable fringe benefits?

(a) \$ .....

(b) \$ .....

10. Do you have any reportable employer superannuation contributions (salary sacrifice)?

(a) \$ .....

(b) \$ .....

---

**IMPORTANT INFORMATION**

This e-mail and any attachments transmitted with it are confidential and should be read only by those persons to whom it is addressed. It may contain sensitive and private proprietary or legally privileged information. No confidentiality or privilege is waived or lost by any mistransmission. If you are not the intended recipient, please immediately destroy it and notify the sender. You must not, directly or indirectly, use, disclose, distribute, print, or copy any part of this e-mail if you are not the intended recipient.

11. Name of employer

(a).....

(b).....

Employer ABN:

(a).....

(b).....

**Please complete if new client or if employer details have changed:**

12. Pay office postal address) and direct phone number

(a).....

Telephone: .....

(b).....

Telephone: .....

13. Employee id number(s) (if applicable)

(a).....

(b).....

14. Please indicate payment frequency eg

(a) weekly, fortnightly, monthly, other .....

(b) weekly, fortnightly, monthly, other .....

---

**IMPORTANT INFORMATION**

This e-mail and any attachments transmitted with it are confidential and should be read only by those persons to whom it is addressed. It may contain sensitive and private proprietary or legally privileged information. No confidentiality or privilege is waived or lost by any mistransmission. If you are not the intended recipient, please immediately destroy it and notify the sender. You must not, directly or indirectly, use, disclose, distribute, print, or copy any part of this e-mail if you are not the intended recipient.

15. Name(s) appearing on contract for investment property.

.....

Ownership percentage (a)..... (b).....

Is the other person your spouse (on your tax return) .....

16. Address of investment property.

.....

.....

.....

17. Date when property became available for rented? ...../...../.....

**Date property purchased** ...../...../.....

18. Year building was constructed .....

19. Amount of gross rent each week. \$.....

20. Have you had a depreciation report completed and if so please supply.

21. Details of loan/s (current outstanding balance and current interest rate details  
eg \$300,000, interest only loan at 5.65% fixed)

Current balance: \$ .....

Current interest rate: .....%

Financial Institution: .....

Account #: .....

Variable or fixed (V/F) .....

**Please provide above details for each loan associated with this property.**

---

**IMPORTANT INFORMATION**

This e-mail and any attachments transmitted with it are confidential and should be read only by those persons to whom it is addressed. It may contain sensitive and private proprietary or legally privileged information. No confidentiality or privilege is waived or lost by any mistransmission. If you are not the intended recipient, please immediately destroy it and notify the sender. You must not, directly or indirectly, use, disclose, distribute, print, or copy any part of this e-mail if you are not the intended recipient.

22. Details of other expenses estimated for the year eg insurance, rates, etc

Expense:

..... \$ .....

..... \$ .....

..... \$ .....

Is the water rates included in the council rates? .....

23. Do you have a claim for other work related expenses eg motor vehicle used for work? (give details).

Expense

..... \$ .....

..... \$ .....

..... \$ .....

24. Have you applied for a variation before?

With respect to this property (Y/N) .....

Another property (Y/N) .....

Do you still own the property (Y/N) .....

Once you have completed and returned the above information I can electronically lodge the relevant form.

Best regards,

**Brett Hetherington**

---

**IMPORTANT INFORMATION**

This e-mail and any attachments transmitted with it are confidential and should be read only by those persons to whom it is addressed. It may contain sensitive and private proprietary or legally privileged information. No confidentiality or privilege is waived or lost by any mistransmission. If you are not the intended recipient, please immediately destroy it and notify the sender. You must not, directly or indirectly, use, disclose, distribute, print, or copy any part of this e-mail if you are not the intended recipient.