



Hetherington+Associates

Chartered Accountants

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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 a new client:

Existing clients please also complete questions 1 – 4 so we can update our records

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

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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 **2020** 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.

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

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

Additional income information required for 2020

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) \$

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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

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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 4.65% fixed)

Current balance: \$

Current interest rate:%

Financial Institution:

Account #:

Variable or fixed (V/F):

Interest only (I/O) or Principal and Interest (P&I):

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If the loan is P&I please provide the following:-

Amount of regular payment: \$.....

Period of payment (weekly, fortnightly or monthly):

Date of payment:/...../.....

Date interest is added to the loan:/...../.....

Length of time remaining on the loan (eg 20 years):

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

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

Expense: \$

..... \$

..... \$

Are 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 \$

..... \$

..... \$

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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

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