2026 Tax Questionnaire

Make your 2026 Tax Return easy
From just $285*

Completing Crawford Accountants "2026 Tax Questionnaire" can save you time and money in preparing this year's tax return. It might even make it possible to complete this year's return without the expense of a long tax consultation.

Once we have reviewed your questionnaire response, we will contact you to clarify any issues it raises.

Alternatively, if you want to discuss any issues on taxation, please make an appointment with one of our tax experts by phoning or emailing us.

When you have completed the *"2026 Tax Questionnaire"* please email it to admin@crawfordaccountants.com.au Or post to:

PO Box 3135
COTHAM VIC 3101

Alternatively you can contact us at:

Phone: 03 9853 1000
Fax: 03 9853 8298
Email: admin@crawfordaccountants.com.au
Website: www.crawfordaccountants.com.au

About this questionnaire

The Australian Tax Office (ATO) allows different claims for various professions and jobs. We have designed this questionnaire to suit the majority of our clients**, so we can identify the maximum amount of tax deductions you can claim according to how you earn your income.

When we complete your return, we will send it to you for your review and signature, it will include our estimate of the amount of money the ATO owes you, or the amount you may owe the tax office.

* Rental properties, investment & business items and Capital Gains calculations etc. will incur an additional cost. Includes GST.

** The questionnaire’s reference to teachers does not affect its relevance to most professions or jobs.

Supporting your claims

Each year, the Tax Office focuses on work-related expense claims. It is still important that you keep accurate receipts and records to substantiate these claims, including log books for vehicle claims of more than 5,000 km. We recommend a diary of start and end odometer readings for claims less than 5,000kms.

Please note, valid tax invoices must be retained for claims made in your tax return for 5 years after lodgment. Receipts are not required when your total claims are less than $300.

This year, the ATO is very keen on reviewing claims associated with investments and compliance issues for superannuation. It has established data links with organisations like banks, Centrelink and the State Revenue Office to compare tax returns with other information collected by those organisations, so don't assume the ATO will "never know" about the interest you earned from savings accounts, or social welfare benefits or assistance you may receive.

Superannuation, particularly self-managed super, is facing greater scrutiny. The ATO is determined to ensure super is put away for retirement and that taxpayers are not finding ways to access their superannuation earlier, either directly or indirectly.

In the latter case, this means investment in holiday homes through a super fund, buying art to hang in the house or office, using cash from super to pay off loans and so on.

If you have investments in shares or property, make sure that the interest you claim on any borrowed money is specifically for earning income and/or capital gain from your investment.

PLEASE REMEMBER:

The ATO can audit any taxpayer's return. If your return is selected, you don't want to end up paying back tax, interest on unpaid tax and possibly fines because you failed to properly account for any income or expenses in your income tax return.

On a positive note, ensure you benefit from any entitlements available through the taxation system, including:

- Superannuation Co-contribution.
- Family Tax Benefit (Direct through Centrelink).
- Self assessment. You must support claims with the appropriate substantiation.

Substantiation Declaration

Name

I, ____________________

HAVE READ AND UNDERSTOOD THE SUBSTANTIATION DECLARATION AND CAN FULLY SUBSTANTIATE ANY CLAIMS I HAVE MADE.

Signature

Date

___ / ___ / ______

Please note: This section must be signed.

Payment Options

Please DEDUCT my fee of $285 + additions from:

My Credit Card ☐ **Visa** ☐ **Mastercard**

Cardholder Name

Card Number

Expiry Date ___ / ___ CCV

Signature

Audit protection

Would you like to take audit protection for your tax return? Price on application.

☐ Yes ☐ No

Please DEPOSIT my refund into:

Institution

Account Name

BSB Number

Account/Member Number

Signature

Date ___ / ___ / ______

* Please note all refunds must now be deposited directly in to a bank account. Please ensure your bank details above are completed

Email

Would you like your tax return emailed to you?

☐ Yes ☐ No

Email Address

Would you like an accountant to contact you

Would you like your accountant to contact you on completion of your tax return? ☐ Yes

Please provide your preferred contact method below:

Phone/Email:

Personal Details

Surname | Given Names | TFN | Number of Dependant children

Address

POSTCODE

Email

Main Occupation

Mobile phone

Date of birth / /

Private health insurance? Yes ☐ No ☐

Spouse or de facto spouse

Surname | Given Names | Spouse TFN

Date of birth / / Taxable Income $

If we do not complete your spouse's Income Tax Return, please complete the following:

- Reportable Fringe Benefits $
- Net Financial Investment Loss $
- Reportable Super Contributions $
- Net Rental Property Loss $
- Tax-Free Government Pensions $
- Child Support Payments $

Income

Government Benefits Yes ☐ No ☐

Have you received any New Start Allowance, Youth Allowance, or other Centrelink benefits?

Dividends Yes ☐ No ☐

Have you received any income from dividends?

Salary Yes ☐ No ☐

Please review your Salary and Wages reporting and confirm 'Tax Ready'

Investments and Managed Funds Yes ☐ No ☐

Have you received any income from Investment or Managed Funds?

If yes, please attach the relevant annual tax statements.

ETP Yes ☐ No ☐

Have you received any Employment Termination Payments?

If yes, please attach ETP Payment Summaries.

Employee Share Schemes Yes ☐ No ☐

Did you acquire shares under an Employment Share Acquisition Scheme? If yes, please provide details.

Rent Yes ☐ No ☐

Have you earned any income from rent?

If yes, please refer to the attached Rental Property Schedule.

Other income Yes ☐ No ☐

Have you received any other income?

If yes, please attach a brief description and show the amount.

Partnerships and trusts Yes ☐ No ☐

Have you received any income from trusts or partnerships?

If yes, please attach Annual Taxation Statement from the Trust or Partnership.

Superannuation Benefits Yes ☐ No ☐

Have you received a lump sum or income stream from a superannuation fund?
If yes, please provide relevant payment summary.

Capital gains

Have you sold any investments such as property, shares or cryptocurrency? Yes ☐ No ☐

If yes, please include details such as the purchase and sale dates, as well as the purchase cost and sale proceeds.

Interest

Have you earned any income from interest on accounts in banks, credit unions or building societies?
If it was earned on joint accounts, please show only your share of the interest.

Bank/Branch	Account No.	Interest (Your Share)	Withholding Tax Paid (If any)

* If insufficient space please attach a list

Deductions

Motor Vehicle Expenses.
Yes ☐ No ☐

Have you used your motor vehicle for work-related travel?

Type of car

Vehicle Registration

Travel can be claimed for:

Tax agent visit/ongoing financial planning visits		Km
Regional meetings, in-service seminars, conferences		Km
School sports/camps*		Km
School excursions		Km
Work experience		Km
Travel between split campus		Km
Travel to client premises		Km
Other		Km
Total Km		Km

* Note: you cannot claim for travel to and from work, nor for trips to check prospective school camp sites.

Travel (Overseas &/or Interstate)
Yes ☐ No ☐

Have you undertaken any work-related travel overseas or interstate?

Clothing (Protective &/or Uniform)
Yes ☐ No ☐

Have you purchased protective clothing or uniforms for work?

Note: sports clothing is not allowed.

Please provide full details of uniforms required to be worn.

Protective clothing/uniforms (Please describe)	$
Protective footwear	$
Laundry & cleaning of protective clothing or uniforms	$
Sunscreen/sunhats/sunglasses	$

Self Education
Yes ☐ No ☐

Have you carried out study related to current work at a recognised educational institution?

*Note: HECS - HELP payments are not an allowable deduction. If yes, please attach a summary.

Other Deductions
Yes ☐ No ☐

If there is anything else you can claim, please attach an itemised list and amount.

Tax Agent

If we didn't prepare your tax return last year, please state the name of the tax agent and how much you paid for the service.

Name of tax agent

Fee $

Financial Planning
Yes ☐ No ☐

Professional fee paid for ongoing financial advice.

Name of adviser

Fees and any other relevant expenses $

Other Work Related Deductions
Yes ☐ No ☐

If yes, please attach a list and an amount

Expenses can be claimed for:

Additions to professional library	$
Excursion costs - accompanying students	$
Tools & equipment (under $300 per item)	$
Professional journals / magazines	$
Seminars, conferences & short courses	$
Professional Associations	$
Vic Institute of Teaching (VIT)	$
Union fees	$

Home Office Expenses
Yes ☐ No ☐

Total # of Hrs (per log) ______ @ 70c $

(The ATO now requires an actual log to be kept, stating the total number of hours worked at home.)

OR

Electricity $ ______ X ______ % (Floor Space) $

GAS $ ______ X ______ %(Floor Space) $

Stationery $

Computer Consumables $

Telephone (Landline)

Avg # of Calls ______ X ______ # of Wks (25c) $

Telephone (Mobile)

Avg cost per month ______ X ______ # of months

X ______ % (work usage) Total $

Internet Service Provider Fees

Avg cost per month ______ X ______ # of months

X ______ % (work usage) Total $

Charities
Yes ☐ No ☐

Have you made donations to registered charities or school building funds? Have you participated in a workplace giving program?

If yes, please attach itemised list and amount.

Income Protection
Yes ☐ No ☐

Did you pay for Income Protection Insurance (outside of your superfund) during the year?

If yes, how much? $

NOT IN SUPERANNUATION

Rental Property

Taxpayer Owner/Joint Name

Address of Rental Property

POSTCODE

Acquired date / /

Disposed date / /

Current year rental dates

From / / To / /

Date property first became available for rent

Date / /

Number of weeks property was rented

List here your proportion of ownership %

When was your Property Mortgage last reviewed?

Date / /

Income (Show Total Figures)

Rent received	$	Other rental related income	$

Expenses (Show Total Figures)

Advertising for tenants	$	Legal fees	$
Bank charges	$	Pest control	$
Body Corporate charges	$	Property agent fees/commission	$
Borrowing expenses	$	Repairs & maintenance	$
Cleaning	$	Stationery, telephone & postage	$
Council rates	$	Water charges	$
Gardening/lawn mowing	$	Sundry rental expenses	$
Insurance	$		
Interest on loans	$		
Land tax	$		
Special building write–offs*	$		

* If your Repair & Maintenance expenditure exceeds $300, please provide itemised details of these expenses.

Total expenses $

Net rent $

* If you have obtained a Quantity Surveyors Report, please provide a copy of the report.
Please note this only applies to new residential construction and residential properties purchased prior to May 2017. Please note more copies of this schedule are available on our website.

PAYG Instalments

Did you pre-pay any income tax by way of annual or quarterly PAYG instalments for the 2025/26 financial year?

Yes ☐ No ☐

HECS/HELP

Do you have a HECS/HELP debt? Yes ☐ No ☐

Did you have a Fee HELP debt? Yes ☐ No ☐

If yes to both these questions, we will source the amount direct from the ATO.

Depreciation

You may claim for depreciation on the cost of items and equipment purchased to be used as part of your work or rental property (including equipment used in your home office, less % private use). You need to base your statement of percentage of private use on a pattern of usage recorded in a diary for at least one month.
If we completed your tax return last year, you only need to show items purchased that cost more than $300.
If you are a new client and you depreciated any items last year, please attach a copy of the depreciation schedule.

Equipment	Purchase price	Date purchased	% private use

Tax Offsets

Child Support Payments

Did you make child support payments during the 2025/2026 financial year?

If yes, please state amount $

We're interested in your views on other tax & business services

Lodging your tax return is only a small part of your Financial Management and Planning. It is far more effective that investors take Taxation into account as part of their overall financial plan. If you would like to discuss any of the below, we would be happy to arrange a no obligation consultation with you.

What areas would you be interested in pursuing (tick one or more of the following):

- ☐ Minimising tax
- ☐ Loan enquiry
- ☐ Start up Business Advice
- ☐ BAS Preparation
- ☐ Self Managed Super Funds
- ☐ Investment Properties
- ☐ XERO Subscriptions
- ☐ ASIC Administration

Other (please describe)

Comments