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Salary Client Checklist

Client Details

Name:

Date:

Occupation:

Address:

Mobile number:

Email:

Spouse Details

Name:

Number of
Children:

Occupation:

Income:

Terms of Engagement

*I confirm that I have read and accepted the Mott Finnis Engagement document and I hereby instruct you to prepare my Income Tax Return for the financial year ended **30 June 2026**.*

I undertake to supply all information necessary to carry out such services, and will be responsible for the accuracy and completeness of such information.

Name: (PLEASE USE BLOCK LETTERS)

Signature:

Date:

Please read carefully through the attached pre-filling report and make note of what information it has already provided.

Once you have done this, complete this checklist and return it to us with any other relevant documents to allow us to complete your income tax return accurately and efficiently. After we receive your documents, we will schedule a phone appointment to finalise your return.

The following questions only apply to income and deductions NOT listed on your prefill. If you answer yes to any question, please provide the supporting documentation listed in each box.

BANK ACCOUNT DETAILS

Your fee for our services will be directly deducted from your refund. Please provide us with your current bank account details so that we can forward the balance of your refund.

Account Name: _____

BSB: _____

Account Number: _____

OFFICE USE ONLY

Client Code:	New Client: Y/N	Deduct Fee: Y/N	TFN:
Drivers License Sighted Y/N	Spouse: Y/N	Parent Client: Y/N	ABN:
Date of Birth:			

1. Income

Please make sure that any income you list is NOT already included in your prefill

Did you receive any other income not listed on your prefill or in the questions above?

Income such as:

- Extra PAYG summaries
- Superannuation payout
- Interest from a bank
- Dividends or shares
- Other

If yes, please provide further information

2. Deductions

If you paid more than \$300 for any individual expenses i.e. work uniform, tools or textbooks, please make a note below.

Do you use a motor vehicle for work?

i.e. carry tools, travel to different work locations, attend work seminars

- Approximately how many kilometres did you drive this year? _____

Did you have any travel expenses for work?

Were you away overnight?

- | | | | |
|----------------|----------|-----------------|----------|
| - Flights | \$ _____ | - Accommodation | \$ _____ |
| - Parking Fees | \$ _____ | - Meals | \$ _____ |
| - Tolls | \$ _____ | - other | \$ _____ |

Do you wear a uniform or protective clothing such as Hi-Vis for work? - Did you purchase any clothing for work purposes? i.e. uniform/protective/ HI-Vis - How much did you spend? \$_____							
Did you enrol in any classes or seminars to increase your work knowledge? - Did you pay any course attendance fees? - If yes, how much? \$_____							
Did you purchase any tools or materials for work? <table style="width: 100%; border: none;"> <tr> <td style="width: 50%; vertical-align: top;"> - Tools \$_____ - Office Equipment & Stationery \$_____ - Sunscreen \$_____ </td> <td style="width: 50%; vertical-align: top;"> - Registration & Subscription fees \$_____ - Other _____ - Other _____ </td> </tr> <tr> <td></td> <td style="text-align: right;">\$ _____</td> </tr> <tr> <td></td> <td style="text-align: right;">\$ _____</td> </tr> </table>		- Tools \$_____ - Office Equipment & Stationery \$_____ - Sunscreen \$_____	- Registration & Subscription fees \$_____ - Other _____ - Other _____		\$ _____		\$ _____
- Tools \$_____ - Office Equipment & Stationery \$_____ - Sunscreen \$_____	- Registration & Subscription fees \$_____ - Other _____ - Other _____						
	\$ _____						
	\$ _____						
Do you use a mobile phone or home internet for work purposes? - How much do you spend per month? \$_____ - What percentage do you use it for work? %_____							
Did you make any donations to a Charity? (not a raffle or draw ticket) - If yes, please provide a list of the Charity and the amount of the donation below							
Did you have any costs while managing your tax affairs last year? (Fees not incurred with Mott Finnis & Co) - How much? \$_____							

If there is any other information that you consider relevant, or you have particular concerns or queries, please do not hesitate to attach additional information or contact us on (08) 8762 3644.

Once we have received your information, we will contact you to make a phone appointment for any final queries.

Thank you for taking the time to submit your information.