

Melican Partners 2020 Mail In Guide

To help us complete your 2019/2020 income tax return, please provide details following our step-by-step guide. Use this guide as a checklist of what to bring with you for your tax return interview or take advantage of our mail service and simply provide all relevant details and email, fax or post back to our office for preparation.

Please supply us with copies of any receipts, statements etc as listed in each section below that applies to you. Please also note the Australian Taxation Office requires you to hold all relevant documentation for a period of five years.

We respect your privacy; all information provided to us is handled and maintained in a confidential manner.

Details to be provided:

- A. Personal Details
- B. Income
- C. Deductions
- D. Tax Offsets
- E. Capital Gains
- F. Rental Properties
- G. Investments
- H. Sole Trader

A. PERSONAL DETAILS

Name(s):	
TFN :	
Date Of Birth:	
Address:	
Contact Numbers:	
- Home	
- Work	
- Mobile	
Email:	
Occupation:	

We will require your bank account details to lodge the return. This will enable the ATO to directly deposit any refund into your nominated bank account.

Account Name	BSB	Account Number

B. INCOME

Please provide details of any income earned in this tax year:

1. PAYG Payment Summary (Group Certificate)

Your employer is no longer required to provide you with a PAYG Payment Summary if they are reporting your wages to the ATO via Single Touch Payroll. If that is the case, we will be able to access your wages information directly from the ATO. If you have still received a PAYG Payment Summary, please include a copy. Also include any eligible termination or superannuation payments.

2. Interest

If you received any interest payments during the financial year, please provide a summary:

Bank / Institution	Gross Amount

C. DEDUCTIONS

Please provide details (receipts or a summary) for any applicable deductions:

1. Work related car expenses (kilometres travelled, car type etc).

2. Work related uniform/occupation specific clothing (including laundry and dry cleaning).

3. Work related self-education expenses (such as tuition fees, photocopying, stationery, fares and text books).

4. Other work related expenses not listed above (including stationery, union fees, diary, tools, telephone, home office, income protection).

If you have been working from home due to COVID-19, please provide details of how many hours per week, and whether you were reimbursed for any costs by your employer.

5. Gifts or donations

6. Cost of managing financial affairs (accountants, financial advisor, stock broker fees)

D. TAX OFFSETS

Please provide details for any of the options below that are applicable.

1. Spouse details

Name	Date of Birth	Spouse Taxable Income

2. Private health insurance

Do you have Private Health Insurance? Yes No

Health Insurance Providers are no longer required by law to provide you with a Tax Statement directly. If you have Private Health Insurance, but have not received a 2020 Tax Statement please note this below, as we should be able to access this information directly from the ATO. If you do have a 2020 Tax Statement, please provide the following details or a copy of your statement.

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Level 1, 103 Grimshaw Street, Greensborough, Victoria, 3088
Ph: 9432 9611 Fax: 9432 9711 Email: melican@melican.com.au

Health Insurer ID	Membership Number	Type	Days Covered	No. of Dependants

Premiums eligible for Australian Government rebate	Australian Government rebate received	Benefit Code

E. CAPITAL GAINS

Please provide details of any capital gains (or losses) you have incurred this financial year.

If you incurred a capital gain (or loss) from the sale of shares, property or any other investments, please provide date of purchase, purchase price, date of sale and sale price.

F. RENTAL PROPERTIES

Please provide details of any rental properties held during the financial year (such as receipts, agent statements, summaries etc). From 1 July 2017 you are not entitled to a deduction for travel expenses relating to your residential rental property, unless an exception applies. These expenses are also not recognised in the cost base of the property for CGT purposes.

1. Ownership

Owner Name	Ownership %

2. Property Address

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3. Weeks rented

No. of Weeks Rented	
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4. Gross rental income

Total Gross Rent	
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5. Rental expenses:

Expenses	Amount (total for year)
Interest on mortgage	
Agent fees/commission	
Bank fees	
Rates	
Water	
Body Corporate	
Insurance	
Land Tax	
Repairs (including painting and plumbing)	
Maintenance of property expenses (including garden)	
Postage and telephone calls	
Other	

If you purchased the property during the financial year, please provide details of:

Cost of Acquisition:	Amount	Fixed Assets (own valuation):	Amount
Solicitor's costs		Heating	
Bank loan application		Air conditioning	
Mortgage insurance		Floor coverings	
Valuation fee		Window furnishings	

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Stamp duty on mortgage		Light fittings	
Stamp duty on sale		Hot water service	
Mortgage legal fee		Oven	
Other		Pool accessories	
		Other	

6. Improvements

For any improvements made to the property, please provide a summary of costs (eg. building costs, replacements of assets etc).

G. INVESTMENTS

Do you have any investments, such as shares, managed funds etc?

1. Dividends

If you received income from any shares held, please provide copies of dividend statements or a summary of unfranked, franked and franking credit amounts.

2. Managed Funds

If you received any income from a managed fund, please provide details (such as tax statements).

3. Expenses incurred

In owning shares, or participating in managed funds, did you incur any of the following expenses? Please provide details:

Advice Costs	
Broker Costs	
Lending Costs (eg. interest paid on a margin loan)	
Costs incurred in running the loan	
Other	

H. SOLE TRADER

Do you run your own business as a sole trader? If so, please provide details of income earned and expenses incurred (eg. profit and loss statement).

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