

Thank you for using our postal return system for your 2002 tax return.

Attached is the form to be completed. Below is a checklist of items that will also need to be posted back to us for processing. Please mark the items you are enclosing.

Checklist to enclose:

- Group Certificates
- The attached postal return form
- Dividend Statements (unless all figures have been listed)
- Annual Investments Statements
- Private Health Cover Annual Statements
- Pension or Centrelink Statements
- Eligible Termination Statement
- If an Annuity is being received, the letter stating the undeducted purchase price and the rebate entitlement
- This completed form

Your completed return will be returned to you within 48 hours of our receiving it. There will be a full copy for your records, a photocopy of the form you completed and your invoice for payment.

We look forward to being of service to you.

Yours Sincerely,

Patricia Winn
PNA., C.Dec

www.patwinn.com.au

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COOPERS PLAINS Q 4180
Phone: (07) 3323 3100
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Winn Stone – Postal Tax Return Details

The following list is a checklist for you to complete, then enclose the relevant group certificates, investment annual tax statements, dividend statements and centrelink statements in the enclosed stamped addressed envelope.

Date: / /

Year: 2002

Tax File Number:

Full Name:

Current Address:

Date of Birth:

Home Ph:

Work Ph:

Partner's Name:

Mobile:

Partner's D.O.B:

E-mail:

Partner's Taxable Income:

Number of dependent children:

Bank Account Details:

Do you have?

(For your return)

HECS Debt:

BSB:

ATO Debt:

Acc No:

Supplementary Loan:

Acc Name:

YOUR INCOME:

Do you have?

Y

N

Number of certificates

➤ Centrelink Allowance

— —

➤ Aust. Government Pension Allowance

— —

➤ Salary & Wages Group Certificates

— —

➤ Eligible Termination Payments

— —

➤ Other pensions or annuities

— —

➤ Foreign Income

— —

➤ Other Income

— —

Bank interest

Bank:

Acc. No.:

Amount:

Dividends

Franked:

Unfranked:

Imp Credits:

Rental Property – See attached list

DEDUCTIONS:

Car – do you use your car for work purposes other than to and from work?

- How many kilometers (if under 5000 km)?
- What size engine does your car have?
- If over 5000 km did you keep a logbook (enclose if yes)?
- How much did you spend on running expenses (include details of any loan)?

Travel – If you traveled overnight, interstate or overseas, list your expenses and the percentage for work use?

Uniforms – How much did you spend on protective clothing?

- Compulsory Uniforms?
- Occupation specific clothing?
(We will calculate any laundry claim)

New Deduction – Have you worked in the sun over the past 5 years? If so what periods in each year?

Self Education Expenses – Did you take a course at a public institution such as Uni. or TAFE? If so –

- Did you purchase equipment?
- Pay student union fees?
- Pay course fees (not HECS)?
- Photocopying or stationery?
- Travel from home to study to home or work to study? If so –
 - How many kilometres?
 - What size engine does your car have?
 - How many hours per week do you study at home?
 - How many dial-up calls do you make per week?
 - Internet costs (what percentage is used for study)?

	Y	N	Cost
➤ Did you attend a seminar or conference	—	—	
➤ Did you purchase a computer or software for work purposes	—	—	

- Telephone used for work _____
- Tools and equipment _____
- Subscriptions and union fees _____
- Journals or periodicals _____
- Expenses in relation to allowances _____
- Any other work deduction _____

Private Health Policy: Y N

Fund Name: _____ **Policy Number:** _____

Do you have Income Protection Insurance: Y N

Company Name: _____ **Policy Number:** _____ **Premium Paid:** _____

Do you contribute to Superannuation? Y N

Name of fund: _____ **Policy Number:** _____ **Your contribution:** _____

OTHER DEDUCTIONS:

- Donations to charities
- Donations to school building fund
- Tax agent fees

REBATES:

- Have you spent over \$ 1 500 (after refunds are deducted) on medical expenses?

Y N \$

- Have you made a contribution to your spouses superannuation fund?

- Have you lived in a special zone for more than 182 days? If so,

Where? Town: _____ Date: _____

- Have you or your partner had a baby since 1st July 2001?

R E N T A L P R O P E R T Y D E T A I L S

(Only to be completed and returned if you have a Rental property)

Income

Rents received _____

Expenses

Rates _____

Insurance _____

Trips to inspect property: No. of trips _____ x

Kilometres in 1 trip _____

The engine capacity of my car is _____ cc

Body Corporate _____

Agents Commission _____

Repairs – *enclose a list showing the type of repairs, date and cost*

Phone Calls (approximately) _____ calls

Interest on loan _____

Bank fees on loan _____

Advertising _____

Cleaning _____

Pest Control _____

Yard Maintenance _____

Water Charges _____

Any other costs _____