

5. OTHER WORK RELATED EXPENSES

Type of Expense	Amount Claimed \$	How is the expense work related	Invoice / Receipt Y/N
Books & Journals			
Computer Expenses			
Home Office Exps			
Home Telephone			
Internet Access			
Memberships			
Mobile Phone			
Seminars			
Subscriptions			
Union Fees			
Other ...			

6. DONATIONS

Charity Details	Amount Claimed \$	Receipt Y/N

7. SUNDRY

Details	Amount Claimed \$	Receipt Y/N
Tax Agent Fees		
Tax Agent Travel		
Investment Expenses		
Income Protection Ins.		

8. OTHER CLAIMS

Claim	Amount \$	Additional Details	Receipt Y/N

NEW EDUCATION EXPENSES TAX REFUND

Childs Name:	Primary / Secondary	Eligible Expense	Amount \$	Receipt Y/N

NON TAX RELATED QUESTIONS

Are you aware that Mulcahy & Co has a legal division to assist with all your legal needs?
 Do you have an up to date Will?
 If No, would you like Mulcahy & Co Legal to contact you to discuss?
 If Yes, do you want Mulcahy & Co Legal to obtain this to hold on your behalf?
 Do you have an appropriate level of risk insurance ie life, trauma, income protection insurance?
 Have you reviewed your superannuation fund investments recently?
 Do you have a regular savings plan?
 If No, would you like to?
 Do you want to know if your paying too much on your loan? If so, please provide your latest loan statements

Yes	No

Declaration:

I declare that the information I have given is true & correct and that I hold the necessary written evidence to support my work related deductions. I have made the necessary inquiries to ensure all expenses listed are deductible.

Signature: _____

Date: _____

RENTAL PROPERTY WORKSHEET FOR THE 2011 FINANCIAL YEAR
(Refer to our website for information concerning your obligations with rental property claims)

Taxpayers Name: _____

Address of Property: _____

Date that first income producing:

Number of Weeks property was rented this year:

If property was purchased or sold during the year, please provide purchase & sale contracts

Was there any private use of the Property: Yes / No

Income	Amount	Details
Gross Rental Income		
Other Related Rental Income (eg Insurance Recoup)		
TOTAL INCOME		
EXPENSES		
Advertising to tenants		
Body Corporate Fees		
Borrowing Expenses		
Cleaning		
Council Rates		
Capital allowances (depreciation on plant)		
Gardening / lawn mowing		
Insurance		
Interest on loan(s) (Please provide Loan Statements)		
Account Number		
Land Tax		
Legal Fees		
Pest Control		
Property agent fees / commission		
Repairs and maintenance		
Capital works deductions (special building write off) (2.5% x \$)		
Stationery, telephone, postage		
Travel expenses		
Water charges		
Sundry rental expenses		
TOTAL RENTAL PROPERTY EXPENSES		
Less: Private component		
How is this calculated?		
NET RENTAL INCOME/LOSS		

Travel Details: _____

ASSET & LIABILITY AND SURPLUS CASHFLOW AVAILABILITY

Updating your net equity and cashflow position can provide useful information with investment and financial decision making. Please take the time to update these details

Name: _____

Date: _____

ASSETS			LIABILITIES		
Details	Value		Details	Mthly Pmt	Owing
Bank Account(s)			Mortgages/Loans		
Term Deposit(s)					
Real Estate	Address / Type				
Motor Vehicles					
Shares / Man Fund					
Superannuation (attach statement(s))					
Household / Personal			Other		
Other					
TOTAL ASSETS			TOTAL LIABILITIES		
NET WORTH (assets less liabilities)					
INCOME			EXPENSES		
Salary / Wage Income	Gross	After Tax	Loan Repayments		
Name:					
Name:					
Interest Income					
Dividends / Managed Funds			Living & Private		
Rental			Superannuation - Extra		
Gross			Superannuation - Co Contribution		
Expenses					
Net rental income (loss)					
			Personal insurance		
			Life / TPD / Trauma / IP		
Other					
TOTAL INCOME			TOTAL EXPENSES		
NET INCOME (EXPENSES)					

WORK RELATED EXPENSES

1. WORK RELATED CAR EXPENSE

Please explain how your car is used for work related purposes: (refer to our website for explanation of how cars can be claimed)

Car Type	Engine Capacity	Car Price	Work Related Kms for year

If using logbook method, please also fill out the following:

Type of Expenses	Total Expense \$	Work % (c)	Amount Claimed	Invoice/ Receipt Y/N
Total klms travelled				
Total work klms travelled				
Work related % (a / b = c)				
Fuel & Oil				
Lease Payments				
Interest				
Insurance				
Registration				
Repairs & Maintenance -				
Other:				

2. WORK RELATED TRAVEL

Type of Expense	Amount Claimed \$	How is this travel expense work related	Invoice / Receipt Y/N

3. UNIFORM, OCCUPATION SPECIFIC OR PROTECTIVE CLOTHING AND LAUNDRY EXPENSES

Type of Expense & how it is work related	Amount Claimed \$	Protective Clothing	Compulsory Uniform	Invoice / Receipt Y/N

4. SELF-EDUCATION EXPENSES

Please give details of course and how it relates to your current work activities:

Type of Expense	Amount Claimed \$	Description	Invoice / Receipt Y/N

PLEASE COMPLETE DETAILS OVER THE PAGE