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| **个人报税清单** |
| **个人基本信息Customer Personal Information Sheet**\*所有您的相关信息都会保密 |
| Family Name 姓 |   |
| First Name 名 |   |
| Middle Name （如果有的话） |   |
| Gender 性别 |   |
| Occupation 职业 |   |
| Date of birth 出生日期 |   |
| Address 住址 |   |
| Email 邮箱 |   |
| Mobile 手机号码 |   |
| Tax file number 税号 |   |
| Bank BSB number 银行BSB码 |   |
| Bank Account number 银行账户号码 |   |
| Did you have a spouse for the full financial year?请问您一整财年都有配偶吗？ |  |
| Spouse's name (Capital Surname) 配偶姓名（姓请大写） |   |
| Spouse's DOB 配偶的出生日期 |   |
| Spouse's Estimated taxable income 配偶的收入 |   |
| Number of dependant child 有几个监护的孩子 |   |
| Are you Australian permanent resident or citizen during the whole financial year? 请问一整财年您都是澳洲永久居民或公民吗？ |   |

I， , authorise Solution In to add me to its tax agent portal.

 Date: \_\_\_\_\_\_\_\_\_\_\_\_\_

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| **Summary of Tax Deductable Expenses****收入相关花费** |
| **Work Related Expenses 收入相关花费清单** |  | **%** **工作所占比例** | **Invoices(Y/N) 是否有收据** |
| How many weeks do you work a year?请问从20年7月1日到21年6月30日工作了多少周？  |  | N/A | N/A |
| Mobile expenses average per month 平均一个月的话费 |   |  |   |
| Internet expenses average per month 平均一个月的网费 |   |    |   |
| Home office weekly average hours 01/07/2020 to 30/06/2021每周在家工作的小时数 |   | N/A |   |
| Self-education expense (work related)自我学习花费 (工作相关), 请写明具体内容 |   | N/A |   |
| Motor vehicle expenses (work related)机动车使用公里数 (工作相关)， |   | N/A |   |
| Laundry expenses per week平均每周洗衣次数（带有logo的工作制服） |   | N/A |   |
| Stationery annual expenses 文具花费/整财年，请写明具体内容 |   | N/A |   |
| Subscriptions and licenses (work related)工作相关订阅以及执照花费，请写明具体内容 |   | N/A |   |
| Tax related expenses 与税务相关的花费 |   | N/A |   |
| Tools, equipment purchased with price < $1000/ item. (work related)工作相关工具及电子设备（ 单个价格小于$1000）请写明具体内容： 例如电脑，手机，工具等 |  |  |  |
| Tools, equipment purchased with price > $1000/ item (work related)*Must provide original/ soft copy invoices for depreciation purpose.* 工作相关工具及电子设备（ 单个价格小于$1000）请写明具体内容： *（为了折旧目的，请务必提供购买发票原件或图片）* |  |  |  |
| Income protection insurance 收入保障保险 |   | N/A |   |
| Donations 捐赠 |   | N/A |   |
| Travelling expense (not reimbursed)出差花费 （未报销部分），请具体写明 |   | N/A |   |
| Personal superannuation deduction: （This is not the employer contributed amount) If so, please provide Acknowledged Notice of Intent个人养老金贡献 （非雇主义务支付养老金9.5%）如果有,请提供Acknowledged Notice of Intent |  |  |  |
| Others, please specify 其他的花费，请具体写明 |   | N/A |   |

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| **Additional Questions其他问题** | **Yes** | **No** |
| 1. Do you have share investment for the year? If so, Share statement and Summary. 请问您有股票投资么？如果有，请提供相关报表和总结。 |   |  |
| 2. Do you have capital gain for the year? If so, ask for capital gain checklist or provide sales and purchase documents.请问本财年您有资产利得吗？如果有，请索要资产利得清单或提供买卖文件。 |  |  |
| 3. Do you have any previous carry forward capital loss?If so, please provide which financial year you actually occurred.请问您有之前未使用的资本损失吗？如果有，请告知是哪个财年产生的。 |  |  |
| 4. Do you have investment properties? If so, investment property schedule. 请问您有用于投资的房产么？如果有，请索要参考投资房相关清单。 |   |  |
| 5. Do you have a sole trader/partnership business? Is it GST and PAYG registered? 请问您是个体户或者有自己的公司么？您有注册GST和PAYG么？ |   |  |
| 6. Are you one of the shareholders or directors of any company? If so, Company tax return, financial statements, director fee, dividend, franking account. 请问您是任何一家公司的股东或者董事么？如果是，请提供公司退税单，财务报表，分红账户等相关文件。 |   |  |
| 7. Are you a beneficiary of a trust?If so Trust return, trust deed review, trust distribution summary. 请问您是任何一家信托的受益者么？如果是，请提供信托收益，信托契约以及信托发行总结报表。 |   |  |
| 8. Do you have a SMSF?If so, SMSF audit and statement of concessional and non-concessional super contribution. 请问您有自营养老金账户么？（ 非普通员工养老金） 如果有，请提供自营养老金账户审计和报表。 |   |  |
| 9. Do you have foreign income? If so, foreign income statement. 请问您有海外收入么？如果有，请提供海外收入报表。 |   |  |
| 10. Are you working or living in remote area of Australia? If so, last year tax return copy and related information. 请问您生活或工作在澳洲的偏远地区么？如果是，请提供去年的退税文件复印件和其他相关信息。 |   |  |
| 11.Did you and your spouse purchase private health insurance?请问您和您的配偶今年是否购买了私人医疗保险？ |  |  |
| 12. Did you contribute superannuation to your spouse? If yes, please provide amount请问您是否有给您的配偶交养老金？如果有，请提供金额 |  |  |