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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 |  |  |