

Client Name: \_\_\_\_\_

INCOME	TOTAL\$	WORK%
PAYG Income (as employee)		
Interest (all bank accounts required)		
Dividends (statements required)		
Managed Funds (statements required)		
Australian Govt Payments		
Employee Share Scheme (statements required)		
Other income (please specify)		

DEDUCTIONS/EXPENSES	TOTAL\$	WORK%
Asset purchases (equipment, tools, furniture)		
Bank charges & fees		
Computer & IT expenses		
Courses & Education		
Electricity and Gas expense		
Equipment hire & rental		
Gifts & Donations to charities		
Home office expenses (total hours in home office)		
Insurances (Business, Contents, Professional Indemnity, Public Liability)		
Interest on loans (to buy shares/or work-related income)		
Internet & Data Charges		
Legal expenses		
Licences and Registrations		
Motor vehicle expenses: fuel		
Motor vehicle expenses: registration & insurance		
Motor vehicle expenses: repairs & maintenance		
Office equipment (printers/computers/I-Pads/Tablets)		
Professional Development		
PPE, protective clothing & items (sunglasses, hats, sunscreen, safety glasses)		
Repairs & Maintenance (of equipment/assets)		
Self-education expenses (TAFE & Uni courses)		
Seminars and conferences		
Stationery & postage		
Subscriptions & Apps		
Tax preparation fee		
Tool replacements		
Telephone & mobile phone expense		
Travel Expenses; car/taxi/uber		
Travel Expenses; accommodation expense		
Travel Expenses; meal expense		
Union Fees		
Uniforms		