



KK PARTNERS GROUP
CHARTERED ACCOUNTANTS



2026 INDIVIDUAL INCOME TAX QUESTIONNAIRE

Name:	Spouse Name:
Date of Birth:	Taxable Income:
Address:	No. of Dependents:
	Did you have Private Health Insurance? Please provide statement
Mobile:	Bank Account for Tax Refund:
Email:	Account Name:
Occupation:	BSB:
Signing Method:	Account Number:

INCOME

Did you earn any of the following types of income: (if Yes, please provide copies of statements or details)

Salary or Wages

Employment Termination Payment

Government Benefits (Centrelink Payments
incl. Youth Allowance, JobSeeker)

Superannuation Income Streams

Superannuation Lump Sum Payment

Interest Income

BSB:	Account No.:	Interest:	Withholding Tax Paid:	Ownership:
BSB:	Account No.:	Interest:	Withholding Tax Paid:	Ownership:

Dividend Income

Rental Property Income

Capital Gains

Please provide details of any assets sold during the year (shares, cryptocurrency, managed funds, property, etc)

Partnership Income

Trust Distribution Income

Business Income

Did you receive any income through a personal ABN? Please provide details of any income(invoices) and expenses
Do you run a datafile for your business?

Foreign Income

Please provide details of any Foreign Income, Expenses and Tax Withheld

Other Income

Rental Property Details

Address of Rental Property

Ownership of property

Dates rented during financial year

From:

To:

Was the property sold during the year?

If yes, please provide rental statements, settlement statement and details of sale including

Purchase Date:

Purchase Price:

Date Sold:

Sale Price:

Address of Rental Property

Ownership of property

Dates rented during financial year

From:

To:

Was the property sold during the year?

If yes, please provide rental statements, settlement statement and details of sale including

Purchase Date:

Purchase Price:

Date Sold:

Sale Price:

Please provide annual rental summary, expenses and loan statements. For a template to assist with Rental Property Expenses, please visit www.kkpartners.com.au/client-resources

DEDUCTIONS

Motor Vehicle

Have you used your car for work-related travel?

* This does not include driving between home and work

Is this an Electric Vehicle?

Make / Model of car

Estimate of total km travelled for the year

Fuel Costs

Repairs and Services

Registration

Insurance

Car Tolls

Interest on Lease Payments (if any)

Business Use Percentage

If claiming more than 5,000km, please provide a logbook

Work Related Travel Expenses

Have you undertaken any work related travel in Australia or Overseas?

Purpose of trip

Accommodation Expenses

Airfare Expenses

Seminar/Conference Expenses

Other

Clothing (Protective and/or Uniform)

Protective clothing/uniform

Protective footwear

Laundry & cleaning of protective clothing

Sunscreen / sunhat / sunglasses

Self-Education Expenses

Have you undertaken any work related self-education?

Course fees

Books/Journals

Travel Expenses

Other

Self-education must be relevant to your current employment and not to open up a new source of income

Other Work-Related Expenses

Stationery
Tools & Equipment
Professional Journals/Magazines
Professional Associations/Memberships
Income Protection Insurance

Mobile Phone (business use %)
Union Fees
Seminars/Conferences
Other
Other

Home Office Expenses

Option 1: Actual Cost / Percentage of Use

Internet & Data	Business Use
Mobile & Home Phone	Business Use
Electricity & Gas	Business Use

Option 2: Fixed Rate per Hour

70cents x Hours Worked

Expenses included in this method include data & internet, mobile & home phone, electricity & gas, computer consumables and stationery

If choosing Option 2:

To claim your Working from Home deduction using this method you must keep a record of:

1. the actual hours you worked from home during the entire financial year (i.e. timesheet, roster, diary or similar document)
2. at least one record for each of the additional running expenses incurred that the Rate per Work Hour includes (i.e. one electricity bill and one phone bill)

Select Option:

** Please provide receipts, documents and records for all deductions to be claimed

Gifts or Donations

Did you make any donations to a registered charitable entity? ?

please attach receipts or details of donations

Interest & Dividend Deductions

Did you incur any expenses such as accounting fees, financial planning fees, investment journals or subscriptions?

Did you pay any interest on a loan that was taken out for an income producing asset other than a rental property?

Please attach details.

Superannuation Contributions

Did you make any personal super contributions?

Attach notice of Intent to Claim from your Super Fund advising deductibility

TAX OFFSETS

Superannuation Tax Offset for Spouse

Did you pay any superannuation contributions on behalf of your spouse?

Please provide details.

HECS/HELP DEBT

Do you have a HECS/HELP debt or Student Financial Supplement Scheme (SFSS) debt?

For the 2025-26 income year, the compulsory repayment threshold is \$67,000

EDUCATION

Did you cease full-time education during the year?

If yes, what date did you cease?

RESIDENCY

Did your Australian residency status change during the year?

i.e. did you work overseas during the year?

If yes, please provide details including dates:

Supporting your claims

It is important that you keep accurate receipts and records to substantiate your claims, including log books for vehicle claims of more than 5,000km. Reasonable estimates may be used for claims less than 5,000km.

Please note, valid tax invoices must be retained for claims made in your tax return for 4 years after lodgement.

Receipts are not required up to a total of \$300, but full details must be recorded.

ATO Interest on late payments can no longer be claimed as a deduction.

The ATO's "Building Confidence" publication indicates that the following activities continue to attract their attention:

- Claims for work-related expenses that are unusually high relative to others across comparable industries and occupations;
- Excessive rental property expenses; non-commercial rental income received for holiday homes; and
- Interest deductions claimed for the private proportion of loans

The list above is provided as a guide only and is not exhaustive. Should you have any other relevant information that could impact on your income tax return, please provide with this checklist.

Substantiation Declaration

I have read and understood the substantiation declaration and can fully substantiate any claims that I have made.

Name:

Date:

When you have completed the Questionnaire, please forward to our office along with your supporting financial documentation.

KK Partners Group
Suite 1, 240 Bay Street
Brighton VIC 3186

Postal: PO Box 293
Brighton VIC 3186

email: office@kkpartners.com.au
website: www.kkpartners.com.au
portal: kkpartners.portal.accountants/login
phone: 03 8534 5500