

# EOFY Tax Return Questionnaire

TAX RETURN · CLIENT INTAKE FORM

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Work through the sections below and fill in or tick whatever applies to you.  
Anything that isn't relevant to your situation, just skip it and move on.

## HOW TO USE THIS FORM

- Click into any field to type. Click checkboxes to tick them.
- Work through sections 1-9. If a section doesn't apply to you (e.g. you don't drive for Uber), just leave it blank and move on.
- Save the PDF as you go using your PDF reader's Save/Save As.
- When finished, email the saved PDF back to [inquire@econohedge.com](mailto:inquire@econohedge.com), along with photos or PDFs of any receipts, statements, or IDs mentioned in the relevant sections.

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## Basic Details

Everyone completes this section.

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Full name, date of birth, and residential address

Tax File Number (TFN)

Bank BSB + account number for your refund (in your own name)

Contact phone number and email

I have a copy of last year's Notice of Assessment (if I've lodged in Australia before)

- I have myGov login access, or it's confirmed linked to the ATO  
This makes pre-filling much faster.

## 2 Visa & Residency Details

Student visa holders — this affects whether you're taxed as an Australian resident (tax-free threshold + normal rates) or a foreign resident (no tax-free threshold, different rates).

- Not applicable to me — skip this section

Visa subclass (e.g. Subclass 500 Student Visa) and grant date

Date you first arrived in Australia

Roughly how many days you've been living/studying in Australia this financial year

Your intended length of stay / whether you plan to stay after your course ends

Ties suggesting you've settled here (lease, phone plan, bank accounts, etc.)

Course details (institution, course name, start/end dates)

Relevant if claiming self-education expenses.

## 3 Employment Income

PAYG / payslip jobs.

- Not applicable to me — skip this section
- I have an Income Statement for each employer (usually available via myGov, but send if you have it)

Employer names and ABNs, if income statements aren't finalised yet

Cash-in-hand or informal income received (must still be declared)

[Empty text input field]

PAYG withholding details, if not showing in myGov

[Empty text input field]

**4 ABN / Sole Trader Income**

Uber, Uber Eats, DoorDash, Menulog, delivery, freelance, etc.

Not applicable to me — skip this section

Your ABN

[Empty text input field]

I'm registered for GST

Note: rideshare/taxi-like services legally require GST registration regardless of income level — worth flagging if unsure.

I have an annual income summary from each platform (e.g. Uber's "Tax Summary", available in the Uber Driver app/portal)

Total gross fares/earnings and any platform fees/commissions deducted

[Empty text input field]

BAS lodged during the year (if GST registered), or confirmed none were required

Bank statements or a summary of business income, if not platform-generated

[Empty text input field]

**Vehicle & work-related expenses (for ABN work)**

I have a logbook (12-week minimum) or odometer readings — needed to claim car expenses

Total kilometres travelled for the year and business-use kilometres

[Empty text input field]

I have receipts/records for: fuel, servicing, car insurance, registration, tolls, parking, car washes, car loan interest or lease payments

Phone bills (with business-use percentage, if phone is also personal)

[Empty text input field]

Equipment purchased (e.g. phone mounts, insulated delivery bags, bike/e-bike if delivery rider)

[Empty text input field]

Health/safety items purchased for the work (hi-vis, helmet, etc. for delivery riders)

**5 Other Deductions**

Anyone with work-related expenses.

- Not applicable to me — skip this section
- Uniforms or protective clothing (with laundering costs, if applicable)
- Union or professional association fees
- Self-education expenses directly related to my current job (not general study)

Working-from-home expenses (hours worked from home, or a diary/log)

Tools, equipment, or subscriptions required for work

Remember: the ATO requires records for all of the above (receipts), not just estimates.

**6 Superannuation**

Super fund name and member number

Personal (after-tax) super contributions made during the year

**7 Other Income**

If applicable.

Not applicable to me — skip this section

Bank interest earned (from any Australian bank accounts)

Dividends or shares income

Centrelink payments received (if any)

Foreign income (from your home country, if still earning any)

Rental income, if any

**8 Health Insurance**

I hold Overseas Student Health Cover (OSHC) or private health insurance — statement attached

**9 Anything Else Worth Mentioning**

Did you change jobs, visas, or address during the year?

Did you leave Australia at any point and return?

Any large one-off expenses related to your income you're unsure how to classify?

Records: the ATO generally requires you to keep receipts and logs for 5 years, so please send digital copies (photos are fine) rather than just totals where possible — it makes your return more defensible if ever reviewed.