

Calculus Accounting & Taxation Services

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Email: niranjan@calculus.net.au ABN: 71 118 685 340

I (Mr./Mrs./Ms)		
Address:	SUBURB	
State	Post Code:	MOBILE:
Tax File Number:		
Date of Birth:		
Occupation:		
Telephone		
Email:		

I hereby instruct Mr Niranjan Kale/Calculus Pty Ltd to prepare and/or assist in the preparation of the tax returns and for that:

<p>I have:</p> <ul style="list-style-type: none">• Provided correct and complete details of all my income including net capital gains for tax purposes from sources in and out of Australia.• Have submitted the evidence of the total income – including INTEREST INCOME & FOREIGN INCOME• Have the necessary receipts and/or other records, or expect to obtain the necessary written evidence within a reasonable time of lodging this tax return to support my claims for deductions, rebates and family tax assistance.• Have provided details for exemption from Medical levy surcharge.• I have understood that any errors or recklessness or fraudulent claims will be subjected to audit carried by ATO and Niranjan Kale / Calculus will not be liable for damages.

Mr Niranjan Kale / Calculus Pty Ltd has explained to me the scheme of the Income Tax Assessment Act 1997 (ITAA 1997) in relation to deductions being divided into general deductions and specific deductions and exclusions from deductions. Specifically I have been explained:

- Provisions relating to work related expenses, work related travel expenses self-education expenses, laundry and dry cleaning expenses for uniform, other work related expenses and donations. And / Or provisions relating to allowable business expenditure and distinction between capital and revenue, and private expenses.
- purpose and design of the substantiation provisions – essentially explaining that deductions may not be allowable by making an estimate of deductible expenses without getting receipts or other evidence. I have understood the requirements under the provisions of ITAA 1997 and confirm my instructions to Mr. Niranjan Kale / Calculus Pty Ltd to lodge the return after including the deductible expenses and claims against my income. Further, by these instructions, I discharge Mr. Niranjan Kale / Calculus Pty Ltd from any responsibilities and liabilities arising on account of any decision of audit or other investigation in respect of any income omitted to be included or any excess claim or disallowance made in determining the total assessable income for the year.
- Mr Niranjan Kale / Calculus Pty Ltd or any representative of Calculus Pty Ltd will not be held liable for any errors, fraudulent claims or reckless behaviour resulting due to incorrect deductions.

Bank Account Details: BSB _ _ _ _ _ **Account Number** _ _ _ _ _

Please Note: There will be a delay in the processing of tax returns if above details are incorrect.

DATE:

SIGNATURE:

Please advise if you have sold any investment property overseas YES Please support with Documents NO

Property Type	Date	Income derived

BUSINESS SCHEDULE: Have you conducted any business venture YES NO

(Please note income earned via EBAY, Gumtree, Facebook or any other profit making schemes or ventures is classified as income)

Type	Income & Expenses	Evidence Type – Bank Statement or paypal account summary.
Accounting Fees		
ASIC Fees		
Advertising		
Bad Debts		
Bank Charges		
Govt. Fees and Charges		
Insurance		
Interest		
Insurance		
Internet maintenance		
Repairs		
Motor Vehicle Expense		
Postage		
Rent		
Security		
Legal Expenses		
Superannuation		
Salary		
Telephone		
Travel		
Seminars		
Internet		

I have: Provided correct and complete details of all my income including net capital gains for tax purposes from sources in and out of Australia.

- **Have submitted the evidence of the total income – including INTEREST INCOME & FOREIGN INCOME**
- **Have the necessary receipts and/or other records, or expect to obtain the necessary written evidence within a reasonable time of lodging this tax return to support my claims for deductions, rebates and family tax assistance.**
- **Have provided details for exemption from Medical levy surcharge.**
- **I have understood the requirements under the provisions of ITAA 1997 and confirm my instructions to Mr Niranjn Kale/ Calculus Pty Ltd /any representative to lodge the tax returns. Further, by these instructions I discharge Mr Niranjn Kale /Calculus Pty Ltd /any representatives from any liabilities arising on account of any decision of audit or other investigation in respect to the income omitted or other reckless and unsubstantiated claims.**

DATE:

SIGNATURE: