

## Individual Questionnaire – 31 March 2024

Name	Phone
Address	Mobile
	Email

Bank Account number for Refunds

Information Required	Yes, No, N/A, Comment
<b>Interest and Dividends Received</b>	
Please provide all dividend statements (including shares in lieu and bonus shares), interest certificates and PIE tax statements for the year.	
<b>Overseas Income Details</b>	
Details of all overseas income and tax deducted from this at source.	
<b>Details of any other income</b>	
Please provide this even if you are unsure as to whether an amount is taxable.	
<b>Income Protection Insurance</b>	
Please provide the letter from your income protection insurance provider regarding payments made for the year.	
<b>Donations</b>	
If you would like us to also prepare your donations rebate please include all donation receipts for the year	
<b>Working for Families</b>	
If your combined income is below a certain level you may be entitled to working for families. If you are not yet registered or there are any changes to your family circumstances during the year please provide details.	

**Thank you for completing this questionnaire. Please sign and return with your information.**

Signature \_\_\_\_\_

Date \_\_\_\_\_