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**Individual Tax Interview Check List**

1. Title (Mr/Mrs):

 First Name:

 Surname name:

2. Tax File Number:

3. Date of Birth:

4. Home address:

5. Phone & email:

6. Occupation:

7. Bank Details for refund

 BSB: A/c No: A/c Name:

8. Other Income such as Bank interest: Dividends: Other Income:

9. Name of Spouse/ De-facto:

10. Date of Birth of Spouse/ De-facto:

11. If married / de-facto between 1 July 2016 and 30 June 2017 when did it occur:

12. Spouse taxable income for 2017 financial year:

13. Entitled to Medicare levy exemption (if you have a Medicare card the answer is NO):

14. Are you Australian Resident for Tax Purposes? If not, Visa status:

15. Email or SMS (take a photo) your group certificates. Provide the employer name here of any missing and we can try and download them from the ATO portal:

16. List ANY expenses you think may be related to your work that your employee has not paid for. We will discuss these in detail when we meet or call:

17. What date and time would you like us to call you to discuss claims: