

# Return Preliminary Information



Please complete, save and email to [bruce@grangepark.com.au](mailto:bruce@grangepark.com.au)

When received Bruce will call to complete the details and your tax return.

Name	Yes	No	Prior Name
Has any part of your name changed since your last tax return			

Year of last last tax return	
Has your address changed since your last tax return	
New residential street address	
Address line 2	
City	
State	Post Code

Spouse /Partner family name	Title
First name	Other given names
Date of Birth	
Tax File Number	

Employment - if required please attach a list.	Main occupation	End date
Employer		End date
Employer		End date
Employer		End date

**Bank Interest:** indicate percentage owned - if more than three attach list

Bank account BSB	Acc. Number	%age
Bank account BSB	Acc. Number	%age
Bank account BSB	Acc. Number	%age

**Shares and Managed Funds:** indicate percentage owned - if more than three attach list

Company or Fund	Units	%age
Company or Fund	Units	%age
Company or Fund	Units	%age

**Rental Property Income:** list properties and percentage owned - attach list if more than 3

<b>Address</b>	<b>%age</b>
<b>Address</b>	<b>%age</b>
<b>Address</b>	<b>%age</b>

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**Other income:** please list any family trusts, partnerships from which you can receive income

**Trust or other entity name**

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**Capital Gains:** have you sold or disposed of any assets (shares, property, other assets) during the year?

**Yes      No**

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**Medicare Levy and Private Health Cover**

**Number of dependent children and  
students under 25**

**Private Health Insurance Fund**

Attach annual statements

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**Have you operated a business during the year?** If so please indicate structure and GST registration status.

<b>Business</b>	<b>Sole Trader</b>	<b>Partnership</b>	<b>Trust</b>	<b>Company</b>
<b>GST Registered</b>	<b>Yes</b>	<b>No</b>		

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Forms and documents should be submitted by email to [bruce@grangepark.com.au](mailto:bruce@grangepark.com.au).

You may also submit forms and documentation via dropbox.

**Grange Park Consultants Pty Ltd will facilitate the preparation of your returns by Bruce J Stockdale RTA 25739775**

I authorise Bruce J Stockdale to complete my tax return/s

**Name**

**Date**