



2017 PAYG VARIATION CLIENT CHECKLIST

In order for us to complete this variation on your behalf it is important that you fill out ALL sections in this checklist. If you have any questions, please contact grow@successaccountinggroup.com.au. Also, please note that a fee from \$250 plus GST applies for each variation prepared including amendments to existing variations.

Personal Information:

Your Name: _____

Your Date of Birth: _____

Your Tax File Number: _____/_____/_____

Your Occupation: _____

How frequently you are paid: _____

Weekly Fortnightly Monthly

Employment Information:

Employer's Name: _____

Employer's ABN: _____

Employer's Address for Payroll: _____

Payroll Officer's Direct Number: _____

Employee ID Number (if applicable): _____

Estimated gross wage for 2017/18: _____

Expected bonuses for 2017/18: _____

Car Allowance: _____

Other Taxable Allowances: _____

Description: _____

Deductions against your Car Allowance:

Vehicle Make and Model: _____

Log Book Use Percentage: _____

Lease/Hire Purchase Interest Paid: _____

Fuel Expenses: _____

Registration & Insurance: _____

Other (Please Specify): _____

Additional Information Required:

- Copy of Depreciation Schedule for all properties (if one has been done and not previously been provided)
- Copy of your very latest payslip that shows the YTD figures. We cannot prepare your variation without this!

Investment Property Details:

	PROPERTY 1	PROPERTY 2
Address of Property:	_____	_____
	_____	_____
The Name on the Titles:	_____	_____
Ownership Percentage:	_____	_____
The Date of Purchase:	_____	_____
Year of Construction:	_____	_____
Estimated Rental Income:	_____	_____
Interest Payable:	_____	_____
Expected Costs for		
Council Rates:	_____	_____
Insurance:	_____	_____
Property Agents Fee:	_____	_____
Body Corporate Fee:	_____	_____
Other (please specify)	_____	_____

	PROPERTY 3	PROPERTY 4
Address of Property:	_____	_____
	_____	_____
The Name on the Titles:	_____	_____
Ownership Percentage:	_____	_____
The Date of Purchase:	_____	_____
Year of Construction:	_____	_____
Estimated Rental Income:	_____	_____
Interest Payable:	_____	_____
Expected Costs for		
Council Rates:	_____	_____
Insurance:	_____	_____
Property Agents Fee:	_____	_____
Body Corporate Fee:	_____	_____
Other (please specify)	_____	_____

Note that we generally do not include any amounts for repairs and maintenance as these expenses are not compulsory and are speculative. In order to ensure you are able to receive future variations we need to be conservative in the figures used here as a resultant tax payable means the ATO can disallow future variations.