

Personal Information

2023 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.

Please do not tell us to copy last year's figures: rent, interest rates and other expenses fluctuate from year to year

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 2021/22:	
Expected bonuses for 2021/22:	
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); and
- Copy of your very latest payslip that shows the YTD figures. We cannot prepare your variation without this!



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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 Agent Fees			
Body Corporate Fees			
Other (please specify)			
	PROPERTY 3	PROPERTY 4	
The address of property:	PROPERTY 3	PROPERTY 4	
The address of property:	PROPERTY 3	PROPERTY 4	
The address of property: The name on the titles:	PROPERTY 3	PROPERTY 4	
	PROPERTY 3	PROPERTY 4	
The name on the titles:	PROPERTY 3	PROPERTY 4	
The name on the titles: Ownership percentage:	PROPERTY 3	PROPERTY 4	
The name on the titles: Ownership percentage: The date of purchase:	PROPERTY 3	PROPERTY 4	
The name on the titles: Ownership percentage: The date of purchase: Year of construction:	PROPERTY 3	PROPERTY 4	
The name on the titles: Ownership percentage: The date of purchase: Year of construction: Estimated rental income:	PROPERTY 3	PROPERTY 4	
The name on the titles: Ownership percentage: The date of purchase: Year of construction: Estimated rental income: Interest payable:	PROPERTY 3	PROPERTY 4	
The name on the titles: Ownership percentage: The date of purchase: Year of construction: Estimated rental income: Interest payable: Expected costs for:	PROPERTY 3	PROPERTY 4	
The name on the titles: Ownership percentage: The date of purchase: Year of construction: Estimated rental income: Interest payable: Expected costs for: Council Rates	PROPERTY 3	PROPERTY 4	
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 3	PROPERTY 4	
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 Agent Fees	PROPERTY 3	PROPERTY 4	
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 Agent Fees Body Corporate Fees	PROPERTY 3	PROPERTY 4	

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.