

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

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 2024/25: _____
Expected bonuses for 2024/25: _____
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!**

INVESTMENT PROPERTY DETAILS

	PROPERTY 1	PROPERTY 2
Address of property:	<hr/>	<hr/>
	<hr/>	<hr/>
The name on the titles:	<hr/>	<hr/>
Ownership percentage:	<hr/>	<hr/>
The date of purchase:	<hr/>	<hr/>
Year of construction:	<hr/>	<hr/>
Estimated rental income:	<hr/>	<hr/>
Interest payable:	<hr/>	<hr/>
Expected costs for:		
➤ Council Rates	<hr/>	<hr/>
➤ Insurance	<hr/>	<hr/>
➤ Property Agent Fees	<hr/>	<hr/>
➤ Body Corporate Fees	<hr/>	<hr/>
➤ Other (please specify)	<hr/>	<hr/>
	<hr/>	<hr/>

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

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.