TAX EDGE ADVISORS

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Gifts and Donations Questionnaire

Taxpayer's name _____

Tax file number _____

Year ended _____

Employer _____

1. Have you made any donations to any fund, authority or institution that is registered for gift deductibility?

   YES/NO

2. Do you have receipts in respect of these donations that have the following information:

   – the date? **YES/NO**

   – the amount? **YES/NO**

   – to whom it was paid? **YES/NO**

3. Were any benefits provided to you as a result of making the donation?

   YES/NO

   If **yes**, please provide details of the benefits supplied and the donation to which it related:

   _____

   _____

   _____

4. If property was donated or gifted to a charity, institution etc, please provide the details below:

Date	**Recipient**	**Item donated**	**Amount/value**
_____	_____	_____	$
_____	_____	_____	$
_____	_____	_____	$
_____	_____	_____	$
Total donation/gift deduction			**$** _____

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Taxpayer's gifts or donations declaration

A. *I confirm that I wish to make the above claim for gifts or donations on the basis that I have incurred the above expenses and I have the necessary records to substantiate my claim;*

B. *My tax agent has explained to me the law as it relates to claims for gifts or donations; and*

C. *I understand that if I have any further queries it is my responsibility to raise them with my tax agent or request a Private Binding Ruling from the ATO.*

Signed .....

Dated .....