



## 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:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

P: 9548 1589  
F: 9547 0602



hilarywijeratne.com.au  
hilary@hilarywijeratne.com.au



Suite 3 - 4  
99 Lightwood Road,  
Springvale VIC 3171



Tax agent  
59754004

"Liability limited by a scheme approved under Professional Standards Legislation."

Hilary Wijeratne Pty Ltd is a Corporate Authorised Representative No. 1252707 of SMSF Advisers Network Pty Ltd  
ABN 64 155 907 681 AFSL 430062 www.san.com.au



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

Date	Recipient	Item donated	Amount/value
_____	_____	_____	\$ _____
_____	_____	_____	\$ _____
_____	_____	_____	\$ _____
_____	_____	_____	\$ _____
<b>Total donation/gift deduction</b>			<b>\$ _____</b>

**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 .....

P: 9548 1589  
F: 9547 0602



hilarywijeratne.com.au  
hilary@hilarywijeratne.com.au



Suite 3 - 4  
99 Lightwood Road,  
Springvale VIC 3171



Tax agent  
59754004

"Liability limited by a scheme approved under Professional Standards Legislation."