

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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*Other than for the acts or omissions of financial services licensees.

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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

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