

Gift or donation questionnaires and worksheets

Gifts or donations questionnaire

Taxpayer's name _____

Tax file number _____

Year ended _____

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
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

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