2025 Tax Planning Questionnaire – Primary Production

Client: ______________________________ Date: ____/____/2025

Please review and complete the following Tax Planning questionnaire for Primary Producers.

This questionnaire is designed to assist you in compiling the necessary information required for Hooper Accountants to accurately review your financial position and projected tax situation before the end of the tax year. The information gathered in this questionnaire allows us to efficiently assess your accounts and determine your opportunities and risks and provide advice on how to best manage your tax position.

Please return your completed questionnaire, with documentation, to us and sign and date this form below.

If you have any queries or concerns, please do not hesitate to contact us.

Hooper Accountants

I/We hereby instruct you to prepare our Financial Accounts to 31 March 2025 and estimates for the financial year ended 30 June 2025.

I/We undertake to supply all information necessary to carry out such services, and will be responsible for the accuracy and completeness of such information.

You are hereby authorised to communicate with my bankers, solicitors, finance companies and all government agencies such as the ATO to obtain such information as you require to enable you to complete the above assignment.

Signed ______________________________ Date ____/____/2025
(Signature)

Name ______________________________
(Please print)

To ensure that our records are up to date, please assist us by updating the following if necessary:			
Entity name:			
ABN:			
CAN: *(if a company)*			
TFN:			
Main Business Activity:			
Address of Business:			
Registered address: *(if a company)*			
Postal address:			
Contact name:			
Telephone:	**Home:**	**Business:**	**Mobile:**
Email address: *(For our records)*			

1.	**Livestock**	**Yes**	**No**	**N/A**
1.1	Please supply the following information for each category of livestock:			
1.1.1	Stock on hand at balance date.	☐	☐	☐
1.1.2	Natural increase to balance date.	☐	☐	☐
1.1.3	Deaths to balance date.	☐	☐	☐
1.1.4	Stock killed for rations or exchanged for goods and services.	☐	☐	☐
2.	**Forced disposal or death of livestock:**	**Yes**	**No**	**N/A**
2.1	Have you experienced the forced disposal of livestock due to:			
2.1.1	Compulsory acquisition of land?	☐	☐	☐
2.1.2	Cattle tick eradication program?	☐	☐	☐
2.1.3	Pasture or fodder destroyed by fire, drought or flood?	☐	☐	☐
2.1.4	Disease control?	☐	☐	☐
2.1.5	Death by disease?	☐	☐	☐
2.1.6	Contamination of property?	☐	☐	☐
	You can elect to spread profit from the forced disposal or death of livestock in these circumstances over a period of 5 years or alternatively to use the profit to reduce the cost of replacement livestock over 5 years.			
2.2	Have you received any insurance recovery for loss of livestock?	☐	☐	☐
3.	**Fencing Assets and Landcare Operations**	**Yes**	**No**	**N/A**
3.1	Please provide details of any expenditure (other than the purchase of plant) for landcare such as:			
3.1.1	Eradication or extermination of animal or vegetable pests.	☐	☐	☐
3.1.2	Destruction of plant growth detrimental to the land.	☐	☐	☐
3.1.3	Preventing or combating land degradation (*other than fencing).*	☐	☐	☐
3.1.4	Erection of fences to exclude livestock or vermin from degraded land or to assist in reclamation of that land.	☐	☐	☐
3.1.5	Erection of fences to prevent land degradation, where the fences separate different land classes in accordance with an approved land management plan.	☐	☐	☐
3.1.6	Construction of a levee or similar improvement.	☐	☐	☐
3.1.7	Construction of drainage works (other than draining swamps or low-lying areas) to control salinity or assist drainage control.	☐	☐	☐
3.2	*Please supply details of capital expenditure on fencing assets that are not deductible as part of landcare operations.*			

4.	Water Facilities	Yes	No	N/A
4.1	Please supply details of:			
4.1.1	The purchase of any plant primarily for the purpose of conserving or conveying water *(e.g. dams, tanks, bores, irrigation channels, pumps, water towers & windmills).*	☐	☐	☐
4.1.2	Any costs incurred on structural improvements primarily for the purpose of conserving or conveying water.	☐	☐	☐
4.1.3	Alterations, additions, extensions or capital repairs to any of those assets.	☐	☐	☐
5.	**Fodder Storage Assets**	**Yes**	**No**	**N/A**
5.1	Please provide details of:			
5.1.1	The purchase of fodder storage assets *(e.g. silos & tanks used to store grain and other animal feed).*	☐	☐	☐
5.1.2	Any costs incurred on structural improvements, capital repairs, alterations, additions or extensions to the fodder storage assets.	☐	☐	☐
6.	**Electricity Connections and Telephone Lines**	**Yes**	**No**	**N/A**
6.1	Have you incurred any capital expenditure in connection with:			
6.1.1	Connecting or upgrading mains electricity?	☐	☐	☐
6.1.2	Connection of a telephone line?	☐	☐	☐
7.	**Horticultural Plants**	**Yes**	**No**	**N/A**
7.1	Have you incurred any expenses in relation to the establishment of plants, such as:			
7.1.1	Acquiring and planting plants or seeds?	☐	☐	☐
7.1.2	Preparing to plant (such as ploughing, contouring, fertilising, stone removal and topsoil enhancement, but not initial land clearing)?	☐	☐	☐
7.1.3	Purchase of pots or potting mixtures?	☐	☐	☐
7.1.4	Grafting trees?	☐	☐	☐
7.1.5	Replacing existing plants or trees, because of diminished economic returns or declining popularity?	☐	☐	☐
7.2	If you wish to self-assess the effective life of any plants, rather than accept the ATO's published effective life, what is your assessment of the effective life?	☐	☐	☐
8.	**Abnormal Receipts**	**Yes**	**No**	**N/A**
8.1	Have you received any income from:			
8.1.1	Double wool clips?	☐	☐	☐
8.1.2	Insurance recoveries?	☐	☐	☐

9.	Farm Management Deposits Scheme	Yes	No	N/A
9.1	Have you made any deposits into a Farm Management Deposit prior to balance date?	☐	☐	☐
	If yes, please provide the following details:			
9.1.1	Name of financial institution:			
9.1.2	Amount of deposit: $			
9.2	Have you received any repayment from a Farm Management Deposit prior to balance date?	☐	☐	☐
	If yes, please provide the following details:			
9.2.1	Name of financial institution:			
9.2.2	Amount of repayment: $			
9.3	Do you intend to make any deposits into, or receive any repayments from, Farm Management Deposits for the rest of the year to 30 June?	☐	☐	☐
	If yes, please provide the following details:			
9.3.1	Amount of deposit: $			
9.3.2	Amount of repayment: $			
9.4	How much interest have you received on Farm Management Deposits to balance date? $			
9.5	How much interest do you expect to receive on Farm Management Deposits for the rest of the year to 30 June? $			
10.	**Trading Accounts**	**Yes**	**No**	**N/A**
Please provide statements from:				
10.1	Co-operatives	☐	☐	☐
10.2	Stock Agents	☐	☐	☐
10.3	Wheat Board	☐	☐	☐
10.4	Wool Board	☐	☐	☐
10.5	Other agencies with whom you trade	☐	☐	☐