

Reference Pack

The canonical ledger authoring reference and manual regression test bed. Emulates the HTML/PDF form vocabulary on the schema v1 type set with every construct annotated. Not advice; not a real pack.
Version 2026.1. Jurisdiction: Australian federal (au-federal).

Fields marked * are required.

Identity

Identity details anchor the rest of the interview. Real packs carry per-section professional-assistance guidance written at curation time.

What is your full name? *

As it appears on official documents.

What is your date of birth? *

Enter the date as YYYY-MM-DD.

What is the best phone number to reach you on?

An Australian phone number, e.g. 0412 345 678.

What is your email address?

A current email address, e.g. name@example.com.

What is your postal address?

Your current postal mailing address.

Financials

Figures are captured as decimal strings. Discuss anything unusual with your adviser — Varen explores, it never declares compliance findings.

What is your annual gross income? *

(AUD)

Enter the full-year gross amount in Australian dollars.

What was your total bonus income (before GST, if any applies)?

(AUD)

Enter the amount before GST (ex GST).

Do you have any other income, in US dollars? (annual, gross)

(USD)

Enter the amount in US dollars (USD).

What is your total for work-related deductions this year?

(AUD)

Enter the full-year total in Australian dollars.

Roughly what percentage of your income goes to work expenses?

(%)

Enter a plain number, e.g. 12.5 (not a fraction, and no % sign).

What is the remaining term of your loan, in months?

(months)

Enter the term in months (convert years to months).

How far is your usual one-way commute, in kilometres?

(km)

Enter the one-way distance in kilometres.

What were your total deductible work expenses?

(AUD)

Add up deductible items from the invoices you have provided. Items that look personal are points to explore with your adviser, never findings.

Is there anything else about your finances we should note?

Please attach one identity document for the 100-point ID check.

Attach the document to your application, then write its file name here:

For example a driver's licence or passport.

Property

Answers here reshape the interview: gate answers can collapse whole sections out of the path.

Do you own any property? *

☐ Yes

☐ No

If you answered No, skip to the Review section — the remaining property questions do not apply. If you have already written notes under 'Is there anything else about your finances we should note?' in the Financials section, continue from 'When did you purchase the property?'.

What type of property is it? *

☐ House

☐ Townhouse

☐ Apartment

☐ Unit

☐ Land

Which of these apply to the property? (select any)

☐ Negatively geared

☐ Positively geared

☐ Holiday letting

☐ Commercial

If you selected 'Holiday letting', skip ahead to 'What percentage of the year is the property let as a holiday rental?' — the purchase and rent questions do not apply.

When did you purchase the property?

Enter the date as YYYY-MM-DD.

What was the purchase price?

(AUD)

Is the property currently rented out?

☐ Yes

☐ No

What is the weekly rent?

(AUD)

If you enter an amount other than \$0, skip to 'Who manages the property?'.

What percentage of the year is the property let as a holiday rental?

(%)

Enter a plain number, e.g. 25 (no % sign).

Who manages the property? (agent name, or 'self')

What are the annual council rates on the property?

(AUD)

What is the annual land tax on the property?

(AUD)

Review

Review captures provenance and consent. The declaration is the classic form tick-box.

How did you hear about this service?

- ☐ Accountant
- ☐ Friend
- ☐ Search
- ☐ Other

If you answered 'Other', please specify in your own words below.

How did you hear about us, in your own words?

Complete only if you selected 'Other' above.

What date would you like to review this with your accountant? *

Enter the date as YYYY-MM-DD.

I declare the information I have provided is accurate. *

☐ Tick to confirm

If you cannot make this declaration, do not submit this application — the application ends here.

Source: Varen ledger schema v1 reference fixture (C523) — <https://varen.tech/>