INCOME TAX RETURN CHECKLIST FOR INDIVIDUALS

Use this checklist as a guide to what you need to bring with you to your Tax Accountant to ensure you're prepared with all required documents.

Tax File Number: ..... / ..... /..... ABN: .....

Name: ……

Mr/Mrs/Ms/Miss: .....

Name changed since last return? YES/NO

If YES, previous name:.....

Residential Address: .....

.....

Postal Address (if different to above): .....

.....

Date of birth: ..... /..... / .....

Telephone: (H) ..... (W) ..... (M) .....

Email: .....

Occupation: .....

Last Year Lodged: …… Previous Accountant (if applicable): ……

Spouse name and D.O.B. (if applicable): .....

Spouse taxable income (if applicable): .....

Do you have any dependent children: Yes/No

If Yes, names of children:

……Date of Birth:……

..... Date of Birth:……

..... Date of Birth:……

..... Date of Birth:……

*Please circle **YES** or **NO** for each of the items listed below and **provide receipts:***

INCOME – Please provide evidence

1. Salary or wages - Please provide Income statements (PAYG Summaries/Group Certificates – or advise when employer confirm they are online and "tax ready" .....YES☐/NO☐

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2. Allowances, Director Fees, etc .....YES☐/NO☐

3. Employer Lump Sum .....YES☐/NO☐

4. Employment termination payments.....YES☐/NO☐

5. Australian Government allowances and payments like Newstart, Youth Allowance and Austudy payment .....YES☐/NO☐

6. Australian Government pensions and allowances.....YES☐/NO☐

7. Australian annuities and superannuation income streams .....YES☐/NO☐

8. Australian superannuation lump sum payments.....YES☐/NO☐

10. Interest Details.....YES☐/NO☐

11. Dividend Statements.....YES☐/NO☐

12. Employee Share Schemes .....YES☐/NO☐

13. Tax Statements from partnerships and/or trusts.....YES☐/NO☐

14. Personal Services Income .....YES☐/NO☐

18. Net capital gains – Details of purchases & sales of investments.....YES☐/NO☐

20. Foreign source income (including foreign pensions) and foreign assets or property .....YES☐/NO☐

21. Rental income & expenses .....YES☐/NO☐

23. Forestry managed investment scheme income.....YES☐/NO☐

24. Other income (please specify) .....YES☐/NO☐

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DEDUCTIONS – Please provide evidence

D1. Work related car expenses

- Make and model of car.....YES☐/NO☐
- Cents per kilometer method (up to maximum of 5,000kms) .....YES☐/NO☐
- If logbook method provide summary of all car expenses.....YES☐/NO☐

D2. Work related travel expenses

Employee domestic travel with reasonable allowance.....YES☐/NO☐

- If the claim is more than the reasonable allowance rate, do you have receipts for your expenses? YES☐NO☐

Overseas travel with reasonable allowance.....YES☐/NO☐

- Do you have receipts for accommodation expenses? .....YES☐/NO☐
- If travel is for 6 or more nights in a row, do you have travel records? (e.g. a travel diary) ....YES☐/NO☐

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Employee without a reasonable travel allowance .....YES☐/NO☐

- Did you incur and have receipts for airfares? .....YES☐/NO☐
- Did you incur and have receipts for accommodation? .....YES☐/NO☐
- Do you have receipts for hire cars (if applicable)? .....YES☐/NO☐
- Did you incur and have receipts for meals and incidental expenses? .....YES☐/NO☐
- Do you have any other travel expenses? .....YES☐/NO☐

Other work-related travel expenses (e.g. a borrowed car) .....YES☐/NO☐
(please specify)

- Number of days spent interstate or overseas? .....

.....

D3. Work related uniform and other clothing expenses

Protective clothing.....YES☐/NO☐

Compulsory uniform.....YES☐/NO☐

Laundry expenses (up to $150 without receipts) .....YES☐/NO☐

Dry cleaning expenses.....YES☐/NO☐

D4. Work related self-education expenses

Course taken at educational institution:

- union fees.....YES☐/NO☐
- course fees.....YES☐/NO☐
- books, stationery .....YES☐/NO☐
- purchase details of assets e.g. computers, etc. used in course of studying.....YES☐/NO☐
- seminars.....YES☐/NO☐
- travel – home/work to institution km's.....YES☐/NO☐
- other (please specify).....YES☐/NO☐

.....

.....

D5. Other work related expenses

Home office expenses (number of hours per week or ideally summary with all expenses) .....YES☐/NO☐

Computer and software.....YES☐/NO☐

Internet related expenses (Please advise___% of business usage).....YES☐/NO☐

Telephone/mobile phone (Please advise___% of business usage).....YES☐/NO☐

Tools and equipment .....YES☐/NO☐

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Subscriptions and union fees.....YES☐/NO☐

Journals/periodicals .....YES☐/NO☐

Purchase details of office equipment (**Date**__/__/____; **Amount** $_____).....YES☐/NO☐

Seminars and courses not at an educational institution:

- course fees .....YES☐/NO☐
- travel .....YES☐/NO☐
- other (please specify) .....YES☐/NO☐

Any other work related deductions (please specify) .....YES☐/NO☐

Other types of deductions

D7 & D8. Interest expensed in relation to purchase of investments ..... YES☐/NO☐

D9. Gifts or donations ..... YES☐/NO☐

D10. Cost of managing tax affairs (including travel to and from Tax Agent) ..... YES☐/NO☐

D12. Personal superannuation contributions ..... YES☐/NO☐

(Provide acknowledgement from Superannuation fund confirming total personal/deductible super contributions)

D15. Other Deductions

e.g. Income Protection Insurance premiums or any other .....

Tax offsets/rebates – Please provide evidence

T4. Did you make superannuation contributions on behalf of your spouse? ..... YES☐/NO☐

Please provide Medicare number and private health insurance annual statement of claims (if applicable).

Did you have private health insurance YES☐NO☐

If yes, please provide private health insurance annual statement.

REMEMBER

To claim a work-related deduction:

- you must have spent the money yourself and weren't reimbursed
- it must directly relate to earning your income
- you must have a record to prove it.
- If the expense was for both work and private purposes, you can only claim a deduction for the work-related portion. Work expenses reimbursed to you by your employer are not deductible.

We hope this helps in knowing what you need to provide. Please contact us to book an appointment and have your tax return lodge by a professional, dedicated team.

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