

2020 TAX RETURN CHECKLIST

Individual (Non-Business)

Full Name	<input style="width: 100%;" type="text"/>		
Postal address	<input style="width: 100%;" type="text"/>		
Date of birth	<input style="width: 150px;" type="text"/>	Tax file number	<input style="width: 150px;" type="text"/>
Contact number	<input style="width: 150px;" type="text"/>	Email address	<input style="width: 150px;" type="text"/>
Bank details	BSB <input style="width: 100px;" type="text"/>	Account	<input style="width: 150px;" type="text"/>
How many employers did you have during the year?	0	1	2
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		3	4+
		<input type="checkbox"/>	<input type="checkbox"/>
What was your main occupation title during the year?	<input style="width: 100%;" type="text"/>		
	YES	NO	
Did you receive any Government payments ? <small>E.g. Newstart Allowance/JobSeeker, Austudy, Age Pension, etc.</small>	<input type="checkbox"/>	<input type="checkbox"/>	
Did you receive a distribution from a partnership or trust?	<input type="checkbox"/>	<input type="checkbox"/>	
Did you receive any investment income ?	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="radio"/> Share dividends	<input type="checkbox"/>		
<input type="radio"/> Bank interest / term deposit	<input type="checkbox"/>		
<input type="radio"/> Managed funds	<input type="checkbox"/>		
<input type="radio"/> Investment property	<input type="checkbox"/>		
Did you sell any investment assets during the financial year?	<input type="checkbox"/>	<input type="checkbox"/>	If yes, please provide documents.
Did you have a spouse (married or defacto)?	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="radio"/> Spouse's name	<input style="width: 100%;" type="text"/>		
<input type="radio"/> Spouse's date of birth	<input style="width: 100%;" type="text"/>		
<input type="radio"/> Spouse's taxable income	<input style="width: 100%;" type="text"/>		
Did you have any dependent children living with you? <small>*Note: Children up to 21 years of age + full-time students under 25</small>	<input type="checkbox"/>	<input type="checkbox"/>	How many: <input style="width: 50px;" type="text"/>
Did you have private health insurance ?	<input type="checkbox"/>	<input type="checkbox"/>	Provider: <input style="width: 100px;" type="text"/>
Did you make any post-tax contributions to super ? <small>*Note: Does not include salary sacrifice</small>	<input type="checkbox"/>	<input type="checkbox"/>	Amount: <input style="width: 100px;" type="text"/>

	YES	NO
Did you use your vehicle for work travel during the year?	<input type="checkbox"/>	<input type="checkbox"/>

- Vehicle registration number
- Vehicle make and model

Cents per kilometre method – this method is applicable if you **have not kept a logbook** but use your car for work.
**Note: the maximum the Taxation Office allows you to claim is 5,000 kilometres.*

- Total work kilometres travelled for the year

Logbook method – the logbook must cover at least 12 continuous weeks and detail odometer readings, dates/times, kilometres travelled and the purpose of each journey.

- Total fuel expenses
- Total registration expense
- Total insurance expense
- Total repairs and maintenance
- Any finance/lease payments for the vehicle? If yes, please provide documents.

Did you incur any work-related travel expenses ?	<input type="checkbox"/>	<input type="checkbox"/>
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Types of expenses may include public transport, air travel, taxi fares, ride-share fees, road tolls, parking fees, short-term care hire, meals, incidental expenses, accommodation, etc.

- Expense type and total
- Expense type and total
- Expense type and total
- Reason/s for travel

Reasons for travel may include carrying bulky tools or equipment that you cannot leave at work, attend conferences or meetings, deliver items, or collect supplies, perform itinerant work, etc.

Did you incur any work-related uniform, clothing, laundry, protective equipment expenses ?	<input type="checkbox"/>	<input type="checkbox"/>
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Uniform that is either compulsory or non-compulsory that is unique and distinctive to the organisation for whom you work. You can claim the costs of washing, drying, and ironing eligible work clothes, or having them dry-cleaned. You must have written evidence, such as diary entries and receipts, for your laundry expenses if the amount of your claim is greater than \$150.

- Expense type and total
- Expense type and total
- Expense type and total

	YES	NO
Did you have any self-education expenses relating to your job?	<input type="checkbox"/>	<input type="checkbox"/>

Self-education expenses are deductible when the course you undertake leads to formal qualification. The course must have sufficient connection to your current work activities as an employee and: maintain or improve the specific skills or knowledge you require in your current work activities; and result in, or is likely to result in an increase in your income.

- Expense type and total
- Expense type and total
- Expense type and total

Did you use your home internet for work-related purposes?	<input type="checkbox"/>	<input type="checkbox"/>
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If you used your own internet for work purposes, you may be able to claim a deduction if you spent the money yourself; the expense was directly related to earning your income, and you have a record to prove it. You cannot claim a deduction where you have not incurred any expenses, or you were reimbursed for any costs by your employer.

- What was your average monthly home internet costs?
- What percentage of your home internet usage would you estimate to have been work-related?

Did you use your mobile phone for work-related purposes?	<input type="checkbox"/>	<input type="checkbox"/>
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If you used your own mobile phone for work purposes, you may be able to claim a deduction if you spent the money yourself; the expense was directly related to earning your income, and you have a record to prove it. You cannot claim a deduction where you have not incurred any expenses, or you were reimbursed for any costs by your employer.

- What was your average monthly mobile phone bill?
- What percentage of your mobile phone usage would you estimate to have been work-related?

Did you use your home office for work-related purposes?	<input type="checkbox"/>	<input type="checkbox"/>
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To claim home office, you need to have a dedicated work area, such as a home office where you perform any work from home. You must also have kept records of either; your actual hours spent working at home for the year, or a diary for a representative four-week period to show your usual pattern of working at home.

- How many hours per week did you work from home, on average?

Did you have any other work-related expenses ?	<input type="checkbox"/>	<input type="checkbox"/>
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Expenses may include books, periodicals, digital information, protective glasses, cosmetics containing sun protection, overtime meals, seminars, conferences, education workshops, union fees, subscriptions to associations, tools or equipment costing less than \$300, stationery, briefcases, satchels, etc.

- Expense type and total
- Expense type and total
- Expense type and total
- Expense type and total

Did you purchase any **work-related tools, equipment or other assets that cost more than \$300?**

YES	NO
<input type="checkbox"/>	<input type="checkbox"/>

If you bought tools, equipment, or other assets to help earn your income, you can claim a deduction for some or all the cost. If you use the tools for both work and private purposes you will need to apportion that amount you claim. For example, if you have a computer that you use for private purposes for half the time, you can only deduct 50% of the cost.

- o Item description, date of purchase, purchase price and work-related percentage?

Did you make any **donations** of \$2 or more?

<input type="checkbox"/>	<input type="checkbox"/>
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Donations made to a GoFundMe personal campaigns are generally considered to be personal gifts and are not guaranteed to be tax-deductible. Only donations made to a GoFundMe certified charity campaigns are guaranteed to be tax-deductible.

- o Recipient and total

- o Recipient and total

- o Recipient and total

Did you pay any **child support** during the year?

<input type="checkbox"/>	<input type="checkbox"/>
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- o Total amount paid

Did you pay any **income protection insurance** premiums?

Note: Does **not include policies covered within your super fund*

<input type="checkbox"/>	<input type="checkbox"/>
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- o Total amount paid

Did you pay any **tax agent/accounting fees** during the year?

<input type="checkbox"/>	<input type="checkbox"/>
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- o Total amount paid

Do you have any notes or comments for your accountant?

<input type="checkbox"/>	<input type="checkbox"/>
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