

INDIVIDUAL TAX RETURN CHECKLIST

Full Name	<input type="text"/>		
Postal address	<input type="text"/>		
Residential address	<input type="text"/>		
Date of birth	<input type="text"/>	Tax file number	<input type="text"/>
Contact number	<input type="text"/>	Email address	<input type="text"/>
Bank details	BSB <input type="text"/>	Account	<input type="text"/>
How many employers did you have during the year?	0 <input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4+ <input type="checkbox"/>		
What was your main occupation title during the year?	<input type="text"/>		
	YES	NO	
Did you receive any Government payments ? <i>E.g. Parenting Payment, JobSeeker, Youth Allowance, Age Pension, etc.</i>	<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"/>	
o Share dividends	<input type="checkbox"/>		
o Bank interest / term deposit	<input type="checkbox"/>		
o Managed funds	<input type="checkbox"/>		
o 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 the purchase & sale documents.
Did you have a spouse (married or de facto)? <i>*If we prepare their tax return, please disregard</i>	<input type="checkbox"/>	<input type="checkbox"/>	
o Spouse's full name	<input type="text"/>		
o Spouse's date of birth	<input type="text"/>		
o Spouse's taxable income	<input type="text"/>		
Did you have any dependent children living with you? <i>*Children up to 21 years of age & full-time students under 25</i>	<input type="checkbox"/>	<input type="checkbox"/>	
o Child's name & date of birth	<input type="text"/>		
o Child's name & date of birth	<input type="text"/>		
o Child's name & date of birth	<input type="text"/>		
Did you have private health insurance ?	<input type="checkbox"/>	<input type="checkbox"/>	Provider: <input type="text"/>
What type of private health insurance coverage did you have? <i>e.g. Hospital cover, extras only</i>	<input type="text"/>		

	YES	NO
Did you use your vehicle for work travel during the year?	<input type="checkbox"/>	<input type="checkbox"/>
o Vehicle registration number	<input type="text"/>	
o Vehicle make & model	<input type="text"/>	
o Vehicle purchase price & date	<input type="text"/>	

Choose Option 1 unless you possess a current logbook, in which case you may choose Option 2.

Option 1	Cents per kilometre method
<i>*This method is applicable if you have not kept a logbook but use your car for work</i>	
o	Total work kilometres travelled for the year <input type="text"/> <i>*Maximum 5,000km</i>

Option 2	Logbook method
<i>*You must have a current logbook to use this method</i>	

Do you have a **current logbook**?

**Must cover a continuous 12-week period & record the date, odometer, km travelled & purpose of the trip. A logbook is valid for 5 years.*

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

o	What date was your logbook completed?	<input type="text"/>
o	What percentage of your vehicle's usage was for work purposes?	<input type="text"/> %

Please provide your **vehicle's actual expenses** for the year (not estimates)

**Provide whole amounts & we will apportion them based on your work-related percentage.*

Registration	<input type="text"/>	Insurance	<input type="text"/>
Repairs & Maintenance	<input type="text"/>	Fuel & oil	<input type="text"/>
Interest	<input type="text"/>	Other	<input type="text"/>
		<i>*Provide description</i>	

Did you incur any work-related **travel expenses**?

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

Types of expenses may include public transport, air travel, taxi fares, ride-share fees, road tolls, parking fees, short-term car hire, meals, incidental expenses, accommodation, etc.

o	Expense type & total	<input type="text"/>
o	Expense type & total	<input type="text"/>
o	Expense type & total	<input type="text"/>
o	Reason/s for travel	<input type="text"/>

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**?

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

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.

o	Expense type & total	<input type="text"/>
o	Expense type & total	<input type="text"/>
o	Expense type & total	<input type="text"/>

Did you have any **self-education expenses** relating to your job?

YES

NO

☐☐

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 & total

○ Expense type & total

○ Expense type & total

Did you use your **home internet** for work-related purposes?

☐☐

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 cost?

○ What percentage of your home internet usage is work-related?

%

Did you use your **mobile phone** for work-related purposes?

☐☐

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 cost?

○ What percentage of your mobile phone usage is work-related?

%

Did you use your **home office** for work-related purposes?

☐☐

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.

○ Total number of hours you worked from home during the year?

Did you have any **other work-related expenses**?

☐☐

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 & total

○ Expense type & total

○ Expense type & total

○ Expense type & total

○ Expense type & total

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

YES

NO

☐☐

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.

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

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

☐☐

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.

- Recipient & total

- Recipient & total

- Recipient & total

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

☐☐

- Total amount paid

Did you make any **post-tax super contributions?**

**Excludes salary sacrifice amounts*

☐☐

- Total amount paid

Have you submitted a **notice of intent to claim a tax deduction** form to your super fund for the contributions made?

☐☐

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

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

☐☐

- Total amount paid

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

☐☐

- Total amount paid

Did you have any notes or comments for your accountant?

☐☐