

INDIVIDUAL INCOME TAX RETURN CHECKLIST

PERSONAL DETAILS

Name: _____

Address: _____

Suburb: _____ Postcode _____

Email: _____

Contact Ph: _____

Occupation: _____

DOB: _____

Bank Details for Refund Deposit - **MUST COMPLETE**

BSB: _____

Act No: _____

Method of payment (circle)

CASH ☐ VISA ☐ DEDUCTION ☐ DIRECT CREDIT ☐

INCOME

Did you receive any income relating to:

- Salary & Wages - Attached? Y ☐ \$ _____
- Centrelink/Other pensions - Attached? Y ☐ \$ _____
- Interest or dividends - see reverse of page Y ☐ \$ _____
- Trusts/managed funds - Attached? Y ☐ \$ _____
- Capital Gain from sale of assets- Attached? Y ☐ \$ _____
- Foreign source income - Attached? Y ☐ \$ _____
- Rental income and expenses - Attached? Y ☐ \$ _____
- Life assurance bonuses - Attached? Y ☐ \$ _____
- Business Income - Attached? Y ☐ \$ _____
- Other Income - Attached? Y ☐ \$ _____
- Did you sell your home? Y ☐

DEDUCTIONS

Work related car expense claims

Kilometre Claim - number of kms (<5,000) # _____ kms

Percentage claim for work use (Log Book) _____ %

Interest on Loan \$ _____

Repairs & Services \$ _____

Loan / Lease Payments \$ _____

Car Washes \$ _____

Fuel \$ _____

Other \$ _____

Registration, insurance & RACV \$ _____

Work related travel expenses

Travel \$ _____ Car Hire \$ _____

Accommodation \$ _____ Toll Fees \$ _____

Meals \$ _____ Parking \$ _____

Other \$ _____ Other \$ _____

Work related uniform & other clothing expenses

Protective Clothing \$ _____

Uniforms \$ _____

Protective or Nonslip Footwear \$ _____

Gloves, Aprons, etc. \$ _____

Laundry \$ _____

Dry Cleaning \$ _____

Other \$ _____

Work related self education expenses

Name of course and institution: _____

Course Fees (HELP is not deductible) \$ _____

Student Union Fees \$ _____

Books \$ _____

Travel \$ _____

Stationery \$ _____

Equipment \$ _____

Other (please specify) _____

_____ \$ _____

_____ \$ _____

DEDUCTIONS

Other Work Related Expenses

Power & Gas for working at home (_____%) \$ _____

No. of hours working at home (____ p/w)

Computer and Software expense (_____%) \$ _____

Internet Charges (_____%) \$ _____

Telephone – Home (_____%) \$ _____

Telephone – Mobile (_____%) \$ _____

Stationery \$ _____

Tools and Equipment \$ _____

Subscriptions \$ _____

Seminars and Short Courses \$ _____

Journals / Periodicals \$ _____

Sunscreen / Sunglasses / Hats \$ _____

Union Fees \$ _____

Accident & Sickness Insurance \$ _____

Business Diary \$ _____

Overtime Meals (claim against allowance) \$ _____

Travel Allowance (No. of days) (_____) \$ _____

Other (please specify) _____

_____ \$ _____

_____ \$ _____

_____ \$ _____

Deductions against investment income

Loan Interest \$ _____

Bank Fees, Computer, Books etc. \$ _____

Investment Advice Fees \$ _____

_____ \$ _____

Personal Superannuation Contributions

Have you attached confirmation from superfund? Y ☐

Other Expenses

Tax Agents Fees \$ _____

Total Kilometres travelled for preparation of tax # _____ kms

Gifts or Donations

Did you contribute at least \$10 to bucket collections Y ☐

_____ \$ _____

_____ \$ _____

_____ \$ _____

INDIVIDUAL INCOME TAX RETURN CHECKLIST

TAX OFFSETS/REBATES/OTHER

- Did you pay child support? (provide details) Y ☐ \$ _____
- Did you make Super contributions on behalf of your spouse? Y ☐ \$ _____
- Do you have an accumulated HELP debt? Y ☐ \$ _____
- Do you have an accumulated SFSS loan? Y ☐ \$ _____

SHARES

- Did you sell any shares during the year? If so, we need dates and details of Buys & Sells Y ☐ \$ _____

CRYPTO

- Did you sell any crypto during the year? If so, we need date and details of Net Profit or Loss on sale. Y ☐ \$ _____

SPOUSE DETAILS

Name _____
DOB _____ Taxable Income \$ _____

DEPENDENT DETAILS

Name of Dependent Child	DOB
1. _____	_____
2. _____	_____
3. _____	_____
4. _____	_____
5. _____	_____

ADDITIONAL INCOME

Ride Sourcing Income	Use Business Checklist
Airbnb Income	Use Rental Checklist
Rental Income + Expenses	Use Rental Checklist

INVESTMENT INCOME DETAILS (INTEREST & DIVIDENDS)

Name	Account No	Your Share	Joint?	Interest Amount	Franked	Unfranked	Imputation Credit
_____	_____	_____	Y <input type="checkbox"/>	_____	_____	_____	_____
_____	_____	_____	Y <input type="checkbox"/>	_____	_____	_____	_____
_____	_____	_____	Y <input type="checkbox"/>	_____	_____	_____	_____
_____	_____	_____	Y <input type="checkbox"/>	_____	_____	_____	_____
_____	_____	_____	Y <input type="checkbox"/>	_____	_____	_____	_____
_____	_____	_____	Y <input type="checkbox"/>	_____	_____	_____	_____
_____	_____	_____	Y <input type="checkbox"/>	_____	_____	_____	_____
_____	_____	_____	Y <input type="checkbox"/>	_____	_____	_____	_____
_____	_____	_____	Y <input type="checkbox"/>	_____	_____	_____	_____
_____	_____	_____	Y <input type="checkbox"/>	_____	_____	_____	_____
_____	_____	_____	Y <input type="checkbox"/>	_____	_____	_____	_____
_____	_____	_____	Y <input type="checkbox"/>	_____	_____	_____	_____
_____	_____	_____	Y <input type="checkbox"/>	_____	_____	_____	_____
_____	_____	_____	Y <input type="checkbox"/>	_____	_____	_____	_____

Please tick if you would like a no obligation consultation with a specialist.

- 1 ☐ Review of your Superannuation
- 2 ☐ Review of your Mortgage/Loans
- 3 ☐ Income Protection Insurance
- 4 ☐ Advice on Investment in Property
- 5 ☐ Advice on Investment in Shares
- 6 ☐ Life, Trauma & Crisis Insurance
- 7 ☐ Advice on Personal Budget
- 8 ☐ Preparation of a Retirement Plan

Best Phone number to contact you on _____

OTHER TAX QUESTIONS OR QUERIES