

infinite possibilities

INDIVIDUAL INCOME TAX RETURN CHECKLIST

PERSONAL DETAILS	INCOME	
Name:	Did you receive any income relating to:	
Address:	Salary & Wages - Attached?	Y [\$
Suburb:Postcode	Centrelink/Other pensions - Attached?	Y 🔲 \$
Email:	Interest or dividends - see reverse of page	Y 🔲 \$
Contact Ph:	Trusts/managed funds - Attached?	Y 🔲 \$
Occupation:	Capital Gain from sale of assets- Attached?	Y
DOB:	Foreign source income - Attached?	Y
Bank Details for Refund Deposit - <u>MUST COMPLETE</u>	Rental income and expenses - Attached?	Y
BSB:	Life assurance bonuses - Attached?	Y
Act No:	Business Income - Attached?	Y
Method of payment (circle)	Other Income - Attached?	Y
CASH VISA DEDUCTION DIRECT CREDIT	Did you sell your home?	Y
	- 2.a. / 66 36 / 66. He He	·
DEDUCTIONS	DEDUCTIONS	
Work related car expense claims Kilometre Claim - number of kms (<5000) # kms	Other Work Related Expenses Power & Gas for working at home	%) \$

CASH VISA DEDUCTION	DIRE	CT CREDIT		
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 expe	enses			
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)				
		\$		
		\$		

Did you sell your home?	Υ 🔛	
DEDUCTIONS		
,		
Business Diary Overtime Meals (claim against allowan	\$	
	\$\$ \$\$ \$\$ \$\$	
Personal Superannuation Contributions Have you attached confirmation from s	\$	
Other Expenses Tax Agents Fees Total Kilometres travelled for preparation Gifts or Donations	\$ n of tax #kms	
	et collections Y	



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TAX OFFSETS/REBATES/OTHER	SPOUSE DETAILS		
Did you pay child support? (provide details) Y \$ Y \$ ** ** ** ** ** ** ** *	Name DOB Taxable Income \$		
Did you make Super contributions on Y \$ behalf of your spouse?	DEPENDENT DETAILS		
● Do you have an accumulated HELP debt? Y ☐ \$	Name of Dependent Child DOB		
■ Do you have an accumulated SFSS loan? Y \$ \$ **The proof of the	1 2		
COVID-19 EXPENSES - SINCE 1 MARCH 2020 No. of hours working from homep/w Equipment Costs Detalis: Stationery / Computer Expenses \$ Internet \$	3		
Mobile Phone \$	Airbnb Income Use Rental Checklist Rental Income + Expenses Use Rental Checklist		
Name Account No Your Share Joint? Interest Amount Franked Unfranked Imputation Credit			
Please tick if you would like a no obligation consultation with a specialist. Review of your Superannuation Review of your Mortgage/Loans Income Protection Insurance Advice on Investment in Property Advice on Investment in Shares Life, Trauma & Crisis Insurance Advice on Personal Budget Preparation of a Retirement Plan Best Phone number to contact you on	OTHER TAX QUESTIONS OR QUERIES		