**Individual income tax return checklist:**

**Full Name:**

**Tax File Number (TFN): ABN (if applicable):**

**Has name changed since last return?** YES/NO

If Yes, previous name :

**Date of birth:**

**Are you an Australian resident?** Yes / No / Unsure

**Address:**

**Telephone contacts:**

Mobile:

Business Hours (work) :

After Hours (home):

Email:

**Electronic banking details** *(for refund if applicable)*

BSB:

Account Number:

Account Name:

**Main occupation:**

**Spouse name and TFN:**

Please circle YES or NO for each of the items listed below:

**INCOME – Please provide PAYG Summary**

* Salary/Wages YES/NO
* Allowances, earnings, tips, directors fees YES/NO
* Employer lump sum payments/Termination Payments YES/NO
* Australian Government allowances and payments like Newstart,

youth allowance andAustudy YES/NO

* Australian Government pensions and allowances YES/NO
* Australian annuities and superannuation income streams YES/NO
* Australian superannuation lump sum payments YES/NO
* Gross Interest YES/NO
* Dividends YES/NO
* Investments in managed funds YES/NO
* Employee share schemes YES/NO
* Distributions from partnerships YES/NO
* Personal services income (PSI) YES/NO
* Net income or loss from business (as a sole trader) YES/NO
* Capital gains on sale of investments or assets YES/NO
* Rental income YES/NO
* Other income YES/NO

**DEDUCTIONS – (Where your total claim for work related expenses exceeds $300 you must hold receipts to substantiate the claims)**

**D1. Work related car expenses (not home to work travel)**

Please provide details of cost of RMS/CTP, insurance, service.

You must record the odometer reading each 30 June and may estimate fuel cost based on annual mileage.

The claim may be based on the work related use as shown in a log book (the log book must be kept for 12 consecutive weeks and must be renewed each 5 years) or a flat rate of 66 cents per kilometre to a maximum 5,000KM.

If the car has been replaced during the year we will also need details of the cost to calculate depreciation, any trade in of a previously claimed car and any finance details to calculate interest to be claimed.

**D2. Work related travel expenses**

Employee domestic travel with a travel allowance paid YES/NO

− If the claim is more than the reasonable allowance rate, do you

have receipts for all expenses YES/NO

Overseas travel with travel allowance paid YES/NO

− If the claim is more than the reasonable allowance rate, do you

have receipts for all 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

Employee not paid a travel allowance

− Did you incur and have receipts for airfares, accommodation,

meals and incidental local travel? YES/NO

**D3. Work related uniform and other clothing expenses**

Protective clothing YES/NO

Occupation specific clothing YES/NO

Non-compulsory uniform YES/NO

Compulsory uniform YES/NO

Conventional clothing is generally not tax deductible even if compulsory eg a shop assistant required to wear the store brand or a solicitor required to wear a suit in Court cannot claim those costs

**D4. Work related self-education expenses**

Course taken at educational institution which must have a direct connection to your income earning activities at the time the study was undertaken:

− course fees YES/NO

− books, stationery YES/NO

− travel, tolls, parking YES/NO

− other (please specify) YES/NO

**D5. Other work related expenses**

Home office expenses (ATO will accept a rate per hour worked) YES/NO

Stationery and computer costs YES/NO

Telephone/mobile phone/Internet (must estimate work related use

eg by noting work related use on one account and using this percentage

on the annual costs YES/NO

Tools and equipment YES/NO

Subscriptions and union fees YES/NO

Journals/periodicals YES/NO

Depreciation on computers and office equipment YES/NO

Sun protection products (i.e., sunscreen and sunglasses) YES/NO

Seminars and courses not at an educational institution YES/NO

Other (please specify) YES/NO

**D7. Interest and dividend deductions**

Generally, interest on funds borrowed to invest YES/NO

**D9. Gifts or donations**

Donations to charities (not raffles or functions etc) YES/NO

**D10. Cost of managing tax affairs**

Tax agent fees and travel to agent YES/NO

**D11. Deductible amount of undeducted purchase price of a**

**foreign pension or annuity** YES/NO

**D12. Personal superannuation contributions**(Not available employees) YES/NO

Full name of fund:

Member Account no:

Fund ABN:

Have you provided the fund a notice of intention to deduct the contribution? YES/NO

Has this notice been acknowledged by the Fund YES/NO

**D15. Other deductions (please specify)** YES/NO

**L1. Tax losses of earlier income years** YES/NO

**Tax offsets/rebates – Please provide evidence**

T1. Are you a senior Australian or a pensioner? YES/NO

T2. Did you receive an Australian superannuation income stream? YES/NO

T3. Did you make superannuation contributions on behalf of your spouse? YES/NO

T4. Did you live in a remote area of Australia or serve overseas with the

Australian defence force or the UN armed forces ? YES/NO

T5. Did you have net medical expenses YES/NO

(Now only available where relating to disability aids, attendantcare or aged

care expenses – the general medical expenses tax offset has been abolished)

**Other relevant information**

* Are you entitled to the Medicare levy exemption or reduction (Generally
* members of the Defence Forces or non residents) YES/NO
* Did you have private health insurance ? YES/NO
* (If yes, please provide the annual statement received from your health fund)
* Did you become an Australian resident at any time during the year? YES/NO
* Did you cease to be an Australian resident at any time during the year?YES/NO
* Did you make a (non-concessional) l super contribution?. YES/NO
* Do you have a HECS/HELP or a SFSL debt? YES/NO
* Did you have care of a dependent child (Please provide names and
* dates of birth) YES/NO
* Income tests information

Did you receive any tax-free government pensions in YES/NO

Did you pay Child Support YES/NO

Did you have a spouse for the full year YES/NO

If you had a spouse for only part of the income year, please specify the dates

between when you had a spouse:

From \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_\_\_\_\_ to \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_\_\_\_\_

What was your spouse’s taxable income for the income year? $..............

Did your spouse have any reportable fringe benefits amounts? YES/NO

Did your spouse receive any Australian Government pensions

or allowances(not including exempt pension income) YES/NO Did your spouse receive any exempt pension income in the year?. YES/NO

Does your spouse have any reportable super contributions? YES/NO