

# INCOME TAX RETURN CHECKLIST FOR INDIVIDUALS

Name of taxpayer \_\_\_\_\_ Contact Number \_\_\_\_\_

Email address \_\_\_\_\_

Residential Address \_\_\_\_\_

Income – Please provide evidence if applicable	YES	NO
Salary or wages from employer		
Allowances, earnings, director’s fees etc		
Lump Sum and Termination Payment Summaries		
Partnership distribution statements		
Trust distribution statement		
Managed funds annual tax statement		
Government Payments Statements (Jobseeker, Austudy, Youth Allowance)		
Australian Government pensions and allowances		
Australian annuities and superannuation income streams		
Australian superannuation lump sum payments		
Gross interest		
Term deposit statements		
Dividends		
Employee share scheme		
Foreign source income – foreign pension, assets or property		
Income protection payments		
Net income or loss from business (as a sole trader) – refer to below checklist		
Rental property income – refer to below checklist		
Capital gain events (Purchase, transaction & disposal details required)		
<input type="checkbox"/> Sale or reinvestments of shares/crypto currency		
<input type="checkbox"/> Sale of assets or property		
Other income (Please specify below)		

Deductions – Please provide evidence if applicable	YES	NO
<b>D1. Work-related car expenses</b>		
Cents per kilometre method (up to a maximum of 5,000 business kms)		
Log book method (provide logbook & all car running costs)		
Have any car expenses been reimbursed by your employer?		
<b>D2. Work-related travel Expenses</b>		
Domestic travel with travel allowance (Location, total days away)		
International travel with travel allowance (Location, total days away)		
No travel allowance (Please provide documentation)		
<input type="checkbox"/> Location, total days away		
<input type="checkbox"/> Airfares		
<input type="checkbox"/> Accommodation		
<input type="checkbox"/> Hire cars		

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<input type="checkbox"/> Meals and incidentals <input type="checkbox"/> Other travel expenses <input type="checkbox"/> Have any expenses been reimbursed by employer?		
Other work-related travel expenses (Taxi, Uber, Tolls, Parking etc )		
<b>D3. Work-related clothing, laundry and dry cleaning expenses</b>		
Protective clothing		
Occupation specific clothing		
Compulsory uniform		
Laundry expenses of the above (up to \$150 without receipts)		
Dry cleaning expenses of the above		
Other claims such as mending/repairs of the above		
<b>D4. Work-related self-education expenses – from educational institution</b>		
Union fees		
Course fees		
Books, Stationary		
Travel		
Other, please specify		
Have any of these expenses been reimbursed by your employer?		
<b>D5. Other work-related expenses</b>		
Working from home <input type="checkbox"/> Fixed rate method (67 cents per hr) <input type="checkbox"/> Actual costs		
Computer and software		
Telephone/mobile phone		
Subscriptions		
Unions fees		
Journals, newspapers, magazines etc		
Sun protection (sunscreen and sunglasses)		
Personal protective equipment (facemasks and sanitisers)		
Seminars and courses not taken at education institution <input type="checkbox"/> Course Fees <input type="checkbox"/> Travel <input type="checkbox"/> Other (please specify)		
Tools and equipment		
Office furniture		
<b>Other deductions</b>		
Gifts and donations		
Income protection insurances		
Personal superannuation contributions <input type="checkbox"/> Have you submitted the notice of intent to claim to your fund? <input type="checkbox"/> Has this notice been acknowledged by the fund?		
Accountant Fees		
Interest charged by the ATO		
Other deductions (Please specify)		

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Rental Property Income & Expenses	YES	NO
Date property purchased, including details of co-ownership		
Date property first rented out during the year		
Annual Income & Expenditure Statement if leased with agent		
All rental income if privately leased		
Expenses if not included in Income & Expenditure statement		
Advertising costs		
Body corporate fees		
Borrowing expenses		
Cleaning		
Council rates		
Details of depreciable assets bought or disposed of during the year		
Gardening / lawn mowing		
Interest paid on loan		
<input type="checkbox"/> Have you refinanced this loan during the year? If yes, please provide details		
<input type="checkbox"/> Have you withdrawn from this loan? If yes, please provide details and what the funds were used for?		
Insurances		
Land Tax		
Legal Fees		
Pest Control		
Property agent fees / commission		
Repairs and maintenance		
Details of any capital works or additions to the property		
Stationary, telephone and postage		
Water charges		
Sundry expenses		
Property disposal details (Purchase & sale documents, solicitor fees, settlement sheets, agents commission, advertising & other)		

Business Income	YES	NO
Access to accounting software provided		
Details of income earned – if not on accounting software		
Copies of lodged business activity statements		
Finalised STP for employees		
Government grants, rebates or payments received		
Superannuation contributions paid to employees		
Purchase of assets details – date and cost		
Insurances		
Advertising		
Materials		
Motor Vehicle costs		
Any other expenses incurred in generating business income		

## INCOME TAX RETURN CHECKLIST FOR INDIVIDUALS

Other information / Offsets / Refunds	YES	NO
Are you a senior Australian or pensioner?		
Did you receive an Australian superannuation income stream?		
Do you have private health insurance?		
PAYG Instalments paid		
Details of dependents (Please provide: age, occupation & income)		
Spouse details (Full Name, DOB, Taxable Income, Exempt Income)		
Did you make superannuation contributions on behalf of your spouse?		
Do you have any study/training repayments (HELP, VSL, SFSS, SSL, ABSTUDY SSL, TSL)?		

Any personal updates – please provide details	YES	NO
Did your name change during the year? <i>This is to be updated via your myGov account. Alternatively we will require a name change or marriage certificate to update the ATO.</i>		
Occupation change		
Job title change		
Address change		
Change to dependent children (increase or decrease)		
Residency changes (date and type of change)		
Any other updates, please specify		

Tax Refund – If refund is expected from return
BSB:
Account Number:
Account Name: