

# INDIVIDUALS TAX CHECKLIST

## Income Tax Return

### CLIENT DETAILS

<b>Name:</b> (Mr/Mrs/Ms/Miss)	_____	
TFN and ABN (If any)	_____	
Residential Address (same/new)	_____	
Postal Address	_____	
Contact Number (Work, Home, Mobile)	_____	
Email:	_____	
Date of Birth:	/ /	_____
Occupation:	_____	
Are you an Australia resident for Tax purposes?	(Y)	(N)
If no - Are you on a working holiday VISA?	(Y)	(N)

### INCOME

Salary and Wages \$	_____	(or confirm Income Statement on MyGov is correct)
PAYG Withholding \$	_____	
Centrelink \$	_____	
Gross Interest earned in bank accounts \$	_____	
Income from partnerships&/or Trusts \$	_____	
Cap. Gains/Losses: Any Assets disposed of. \$	_____	
Dividends \$	_____	
Other Income \$	_____	

### DEDUCTIONS

Work-related car expenses (running Costs) \$	_____
Parking fees & Tolls \$	_____
Business Kms Travelled \$	_____
<b>Other Work related Travel expenses</b>	
Employee domestic travel with reasonable allowance \$	_____
<i>if a claim is more than reasonable allowance rates</i>	
<i>do you have receipts for the expense?</i>	
Overseas Travel with reasonable allowance \$	_____
<i>Do you have a travel Diary/Itinerary</i>	
<i>and accommodation receipts?</i>	

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### Work related uniform/other clothing expenses

Protective Clothing \$ \_\_\_\_\_  
 Occupation Specific Clothing \$ \_\_\_\_\_  
 Laundry (up to \$150 without receipts) \$ \_\_\_\_\_  
 Dry Cleaning \$ \_\_\_\_\_  
 Other Expenses \$ \_\_\_\_\_

### Work related Self education expenses

#### (Formal Courses)

Student Union Fees \$ \_\_\_\_\_  
 Course Fees \$ \_\_\_\_\_  
 Travel for Education purposes \$ \_\_\_\_\_  
 Text Books \$ \_\_\_\_\_  
 Other(specify): \_\_\_\_\_

### Other Work related Expenses Seminar and course not an educational institution but are work related:

Seminar and course fees \$ \_\_\_\_\_  
 Travel \$ \_\_\_\_\_  
 Calculators and & Electrical Organisers \$ \_\_\_\_\_  
 Home Office \$ \_\_\_\_\_  
 Computers & Software (including purchase date) \$ \_\_\_\_\_  
 Telephone Expenses \$ \_\_\_\_\_  
 Internet Expenses \$ \_\_\_\_\_  
 Tools & Equipment \$ \_\_\_\_\_  
 Diary and Stationary \$ \_\_\_\_\_  
 Briefcase used for employment \$ \_\_\_\_\_  
 Professional Association Membership \$ \_\_\_\_\_

Subscriptions \$ \_\_\_\_\_  
 Income Protection Insurance \$ \_\_\_\_\_  
 Teaching Aids \$ \_\_\_\_\_  
 Accommodation & Meals \$ \_\_\_\_\_  
 Wet Weather Gear \$ \_\_\_\_\_  
 Sun Protection Products \$ \_\_\_\_\_  
 Union Fees \$ \_\_\_\_\_  
 HECS/HELP Debt \$ \_\_\_\_\_  
 Professional Library \$ \_\_\_\_\_  
 Interest and Dividend deductions \$ \_\_\_\_\_  
 Gifts and donations, Incl donations to political parties \$ \_\_\_\_\_  
 Cost of managing Tax affairs (Tax Agent Fees) \$ \_\_\_\_\_  
 Australian Film Industry incentives \$ \_\_\_\_\_

Deductible amount of UPP of Foreign pension/annuity \$ \_\_\_\_\_  
 Other Deductions \$ \_\_\_\_\_

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### TAX OFFSETS

Are you Married and/or De-facto ? (Y) (N)

First Name:

Last Name:

Date of Birth:

Do you have any dependent children - (Y) (N)

If Yes, How many?

Do you have Private Health Insurance with hospital cover? (Y) (N)

If yes, we can retrieve this information for you via our Tax Agent Portal.

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### TAXPAYERS DECLARATION

I declare that the information I have provided in this questionnaire (including any attachments) are true and correct to the best of my knowledge. I declare I have the necessary receipts and other records (or can obtain the necessary written evidence within a reasonable time) to support my claims.

Taxpayer's Signature

Date: