

Individual income tax return checklist

Full Name	
Tax File Number	
Date of birth	
ABN (if applicable)	
Address	
Address (postal) <i>(Put 'as above' if the same)</i>	
Telephone contacts	Mobile: Business Hours (work): After Hours (home):
Email	
Bank account details	Name of account: BSB: Account number:

Please circle **YES** or **NO** for each of the items listed below and provide relevant details (if known) were prompted.

This checklist is a guide for information about what to bring to your appointment. Please simply disregard anything that may not be relevant to you, and bring along anything else that you think may be useful.

Income tax return checklist continued

INCOME – Please provide evidence

1. Salary or wages YES/NO
 2. Allowances, earnings, tips, director's fees etc YES/NO
 3. Employer lump sum payments YES/NO
 4. Employment termination payments YES/NO
 5. Australian Government allowances and payments like Newstart, youth allowance and austudy payment YES/NO
 6. Australian Government pensions and allowances YES/NO
 7. Australian annuities and superannuation income streams YES/NO
 8. Australian superannuation lump sum payments YES/NO
 9. Attributed personal services income YES/NO
 10. Gross Interest YES/NO
 11. Dividends YES/NO
 12. Employee share schemes YES/NO
 13. Distributions from partnerships and/or trusts YES/NO
 14. Personal services income (PSI) YES/NO
 15. Net income or loss from business (as a sole trader) YES/NO
 16. Deferred non-commercial business losses YES/NO
 17. Net farm management deposits or repayments YES/NO
 18. Capital gains YES/NO
 19. Foreign entities:
 - Direct or indirect interests in a controlled foreign company YES/NO
 - Transfer of property or services to a non-resident trust YES/NO
 20. Foreign source income (including foreign pensions) and foreign assets or property YES/NO
 21. Rent YES/NO
 22. Bonuses from life insurance companies or friendly societies YES/NO
 23. Forestry managed investment scheme income YES/NO
 24. Other income (please specify below) YES/NO
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Income tax return checklist continued

DEDUCTIONS – Please provide evidence

D1. Work related car expenses

- cents per kilometre method (up to a maximum of 5,000 kms).....YES/NO
- log book method.....YES/NO
- one-third of actual expenses method.....YES/NO
- 12% of actual cost method.....YES/NO

D2. Work related travel expenses

- Employee domestic travel with reasonable allowance.....YES/NO
- If the claim is more than the reasonable allowance rate, do you have receipts for your expenses?.....YES/NO
- Overseas travel with reasonable allowance.....YES/NO
- Do you have receipts for accommodation 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 without a reasonable travel allowance.....YES/NO
- Did you incur and have receipts for airfares?.....YES/NO
 - Did you incur and have receipts for accommodation?.....YES/NO
 - Do you have receipts for hire cars (if applicable)?.....YES/NO
 - Did you incur and have receipts for meals and incidental expenses?.....YES/NO
 - Do you have any other travel expenses?.....YES/NO
 - Employee without a reasonable travel allowance.....YES/NO
- Other work-related travel expenses (e.g., a borrowed car) (please specify).....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
- Laundry expenses (up to \$150 without receipts).....YES/NO
- Dry cleaning expenses.....YES/NO
- Other claims such as mending/repairs, etc (please specify).....YES/NO

DEDUCTIONS – Please provide evidence

D4. Work related self-education expenses

Course taken at educational institution:

- union fees YES/NO
- course fees YES/NO
- books, stationery YES/NO
- depreciation YES/NO
- travel YES/NO
- other (please specify) YES/NO

D5. Other work related expenses

- Home office expenses YES/NO
- Computer and software YES/NO
- Telephone/mobile phone YES/NO
- Tools and equipment YES/NO
- Subscriptions and union fees YES/NO
- Journals/periodicals YES/NO
- Depreciation YES/NO
- Sun protection products (i.e., sunscreen and sunglasses) YES/NO
- Seminars and courses not at an educational institution:
- course fees YES/NO
- travel YES/NO
- other (please specify) YES/NO
- Any other work related deductions (please specify) YES/NO

Other types of deductions

- D6. Low value pool deduction YES/NO
- D7. Interest deductions YES/NO
- D8. Dividend deductions YES/NO
- D9. Gifts or donations YES/NO
- D10. Cost of managing tax affairs YES/NO
- D11. Deductible amount of undeducted purchase price of a foreign pension or annuity YES/NO

DEDUCTIONS – Please provide evidence

Other types of deductions (continued)

Course taken at educational institution:

D12. Personal superannuation contributions YES/NO

Full name of fund:

Account no:

Fund ABN:

Fund TFN:

D13. Deduction for project pool YES/NO

D14. Forestry managed investment scheme deduction YES/NO

D15. Other deductions (please specify) YES/NO

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L1. Tax losses of earlier income years YES/NO

Income tax return checklist continued

TAX OFFSETS/REBATES – Please provide evidence

- T1. Do you have a dependent spouse born on or before 30 June 1952? YES/NO
- T2. Are you a senior Australian or pensioner? YES/NO
- T3. Did you receive an Australian superannuation income stream? YES/NO
- T4. Did you make superannuation contributions on behalf of your spouse? YES/NO
- T5. Did you live in a remote area of Australia or serve overseas with the Australian defence force or the UN armed forces last financial year? YES/NO
- T6. Did you have net medical expenses over \$2,120 last financial year? (Subject to eligibility) YES/NO
- T7. Did you maintain an invalid or carer dependant including your spouse, parent, Parent-in-law, your or your spouse's child, brother or sister aged over 16 years old? YES/NO
- T8. Are you entitled to claim the landcare and water facility tax offset? YES/NO
- T9. Are you a mature age worker born before 1 July 1957 with 'net income from working' of less than \$63,000? YES/NO
- T10. Other non-refundable tax offsets (please specify) YES/NO
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- T11. Other refundable tax offsets (please specify) YES/NO
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OTHER RELEVANT INFORMATION

Medicare levy and Medicare levy surcharge

M1. Are you entitled to the Medicare levy exemption or reduction last year?YES/NO
(If yes, please specify): _____

M2. For the entire income year, were you and all of you dependants (including your spouse) covered by the appropriate private health insurance hospital cover?YES/NO

Private health insurance policy details

Do you have the details of your private health insurance policy detailsYES/NO

If YES – please provide details below – which can be obtained from your private health insurance statement

Health insurance ID _____

Membership Number _____

Share of premiums paid in the financial year (**label J** on your statement) _____

Share of government rebate received (**label K** on your statement) _____

Benefit code (**label L** on your statement) _____

Adjustments

A1: Were you under the age of 18 on 30 June last financial year?YES/NO

A2: Did you become an Australian tax resident at any time during the last income year?YES/NO

A3: Did you cease to be an Australian tax resident at any time during the last income year?YES/NO

A4: Did you make a non-deductible (non-concessional) personal super contribution last year?YES/NO

A5: Did a trust or company distribute income to you in respect of which family trust Distribution tax was paid by the trust or company?YES/NO

C1: Did you pay any tax within 14 days before the due date (e.g., HECS/HELP)?YES/NO

Income tests information

IT1: Do you have any total reportable fringe benefits amounts last year?YES/NO

IT2: Do you have any reportable employer superannuation contributions last year?YES/NO

IT3: Did you receive any tax-free government pensions last year?YES/NO

IT4: Did you receive any target foreign income last year?YES/NO

IT5: Did you have a net financial investment loss last year?YES/NO

IT6: Did you have a net rental property loss last year?YES/NO

IT7: Did you pay child support last year?YES/NO

IT8: Do you have dependent children last year?YES/NO

If yes, how many? _____

OTHER RELEVANT INFORMATION

Spouse details—married or de facto (including same sex)

1. Did you have a spouse for the full financial year?YES/NO
- If you had a spouse for only part of the income year, please specify the dates when you had a spouse:
From ____ / ____ / ____ to ____ / ____ / ____
2. Did your spouse die during the last income tax year?YES/NO
3. What is your spouse's name and date of birth? (If you had more than one spouse during the previous year, provide the name of your spouse on 30 June last year or your last spouse)
- Name:** _____
- DOB:** _____
4. Did your spouse (named above) have taxable income for the last income year? YES/NO
- If **yes**, what was the amount? \$ _____
5. Did your spouse have a share of trust income on which the trustee is assessed under S.98 of the ITAA36 not included in your spouse's taxable income for last yearYES/NO
- If **yes**, what was the amount? \$ _____
6. Did a trust/company distribute income to your spouse last year in respect of which family trust distribution tax was paid by the trust/company?YES/NO
- If **yes**, what was the amount? \$ _____
7. Did your spouse have reportable fringe benefits amounts for the last income year?YES/NO
- If **yes**, what was the amount? \$ _____
8. Did your spouse receive any Australian Government pensions or allowances (not including exempt pension income) in the last income year?YES/NO
- If **yes**, what was the amount? \$ _____
9. Did your spouse receive any exempt pension income in the last income year? YES/NO
- If **yes**, what was the amount? \$ _____
10. Does your spouse have any reportable super contributions for the last income year?YES/NO
- If **yes**, what was the amount? \$ _____
11. Did your spouse receive any tax-free government pensions paid under the Military Rehabilitation and Compensation Act 2004?YES/NO
- If **yes**, what was the amount? \$ _____
12. Did your spouse receive any 'target foreign income' in the last income year?YES/NO
- If **yes**, what was the amount? \$ _____
13. Did your spouse have a total net investment loss (i.e., the financial investment loss/rental property loss last yearYES/NO
- If **yes**, what was the amount? \$ _____

OTHER RELEVANT INFORMATION

Spouse details—married or de facto (including same sex) continued

14. Did your spouse pay child support during the last financial year.....YES/NO

If **yes**, what was the amount? \$ _____

15. If your spouse is 55 to 59 years old, did they receive a superannuation lump sum (other than a death benefit) during the last income year which included a taxed element that does not exceed their low rate cap?YES/NO

If **yes**, what was the amount? \$ _____

Other

1. Do you have a HECS/HELP liability or a student financial supplement loan debt?YES/NO

2. Do you have a loan with a private company or have such a loan amount forgiven?YES/NO

(If yes, please specify)—(reviewer consider if deemed dividend in year under Division 7A):

3. Did you make a gain or loss from financial arrangements and wish to apply the TOFA rules to bring them into account for tax purposes in the previous income tax year.....YES/NO

4. Did you receive any benefit from an employee share acquisition scheme?.....YES/NO

Dated the _____ day of _____ 20 _____

Signature of taxpayer

Name (print)