



## 2023 TAX RETURN CHECKLIST

Name: \_\_\_\_\_

Contact Phone No.: \_\_\_\_\_

Email Address: \_\_\_\_\_

Have you moved or changed your postal address in the last year? Yes ☐ No ☐  
(If Yes – please provide your new address details)

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Has your name or marital status changed in the last year? Yes ☐ No ☐  
(If Yes – please give your new name or status)

\_\_\_\_\_

Please provide your bank account details as refunds will only be refunded electronically:

Account name: \_\_\_\_\_

BSB: \_\_\_\_\_ Account Number: \_\_\_\_\_

Information we will need to complete your 2023 Income Tax Return:-

### Income

	Item	Check if Applicable	Documentation/Information Required
1.	Salary or Wages (including allowances, directors fees etc)	<input type="checkbox"/>	Pay As You Go (PAYG) payment summaries from each employer
2.	Employer Termination Payments (ETPs)	<input type="checkbox"/>	ETP payment summaries
3.	Australian Government Allowances & Payments	<input type="checkbox"/>	PAYG payment summary or letter from agency stating amount received
4.	Australian annuities, superannuation income streams & superannuation lump sum payments	<input type="checkbox"/>	PAYG payment summaries
5.	Reportable Fringe Benefits Tax (FBT)	<input type="checkbox"/>	PAYG payment summaries
6.	Interest	<input type="checkbox"/>	Bank statements showing interest earned in the financial year
7.	Dividends	<input type="checkbox"/>	Dividend statements
8.	Employee Share Schemes	<input type="checkbox"/>	- Employee share scheme: Employee summary - Other relevant documentation
9.	Partnerships & Trusts	<input type="checkbox"/>	- Annual tax statement - Trust Distribution Statement - Partnership distribution statement
10.	Income from Business	<input type="checkbox"/>	- Invoices issued - Invoices paid; or - Summary of the above
11.	Net farm management deposits or withdrawals	<input type="checkbox"/>	Account statement for Farm Management Deposits Scheme
12.	Capital Gains (Sale of shares, property, etc)	<input type="checkbox"/>	- Purchase documents - Sales documents - Invoices for expenses relating to purchase or sale of assets



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13.	Foreign Source Income (Pensions, dividends, interest, etc)	<input type="checkbox"/>	<ul style="list-style-type: none"> <li>- Payslips</li> <li>- Foreign company/partnership/trust distribution advices</li> <li>- Invoices for expenses incurred in earning foreign income</li> <li>- Bank statements</li> </ul>
14.	Rent	<input type="checkbox"/>	<ul style="list-style-type: none"> <li>- Annual statement from property agent</li> <li>- Invoices for expenses</li> <li>- Loan statements showing interest paid</li> </ul>
15.	Forestry managed investment scheme income	<input type="checkbox"/>	<ul style="list-style-type: none"> <li>- Annual tax statement</li> <li>- Distribution statement</li> </ul>
16.	Other Income	<input type="checkbox"/>	Records of amounts received

### Deductions

Item		Check if Applicable	Documentation/Information Required
1.	Motor Vehicle Expenses	<input type="checkbox"/>	
	Cents per kilometre	<input type="checkbox"/>	Beginning & closing odometer reading
	Methods: Logbook	<input type="checkbox"/>	<ul style="list-style-type: none"> <li>- Receipts for: <ul style="list-style-type: none"> <li>• Fuel &amp; oil</li> <li>• Interest payments Insurance/CTP</li> <li>• Registration</li> <li>• Servicing, tyres &amp; battery replacement</li> <li>• Purchase value/Date of purchase</li> <li>• Logbook (if not provided within the last 5 years)</li> </ul> </li> </ul>
2.	Travel Expenses	<input type="checkbox"/>	<ul style="list-style-type: none"> <li>- Receipts for: <ul style="list-style-type: none"> <li>• Parking fees &amp; road tolls</li> <li>• Car hire</li> <li>• Public transport</li> <li>• Meals, accommodation &amp; incidentals</li> </ul> </li> </ul>
3.	Clothing, Laundry & Dry-Cleaning Expenses	<input type="checkbox"/>	<ul style="list-style-type: none"> <li>- Receipts for: <ul style="list-style-type: none"> <li>• Protective clothing</li> <li>• Uniforms</li> <li>• Occupation-specific clothing</li> <li>• Laundering &amp; dry-cleaning</li> </ul> </li> </ul>
4.	Self-Education Expenses	<input type="checkbox"/>	<ul style="list-style-type: none"> <li>- Receipts for: <ul style="list-style-type: none"> <li>• Fees for courses</li> <li>• Textbooks, stationery, union fees</li> <li>• Kilometres travelled between: <ul style="list-style-type: none"> <li>◦ Home &amp; place of education</li> <li>◦ Workplace &amp; place of education</li> </ul> </li> </ul> </li> </ul>
5.	Other Work Related Expenses	<input type="checkbox"/>	<ul style="list-style-type: none"> <li>- Receipts for: <ul style="list-style-type: none"> <li>• Union fees</li> <li>• Professional seminars, courses, conferences &amp; workshops</li> <li>• Reference books, technical journals &amp; trade magazines</li> <li>• Tools &amp; equipment</li> </ul> </li> </ul>
6.	Interest Expenses	<input type="checkbox"/>	Bank or financial institution statements
7.	Dividend Expenses	<input type="checkbox"/>	Dividend statements, bank and/or financial institution statements
8.	Gifts or Donations	<input type="checkbox"/>	Receipts of donations and gifts contributed to approved organisations



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9.	Cost of Managing Tax Affairs	<input type="checkbox"/>	Receipts for expenses incurred in managing tax affairs
10.	Personal Super Contributions	<input type="checkbox"/>	Acknowledgement from your fund or RSA provider that you are entitled to claim the superannuation deduction or s290-170 Notice
11.	Forestry Managed Investment Scheme (FMIS) Expenses	<input type="checkbox"/>	- Invoices of payments made to a FMIS - Distribution summary
12.	Other Deductions	<input type="checkbox"/>	- Receipts for Income protection, sickness & accident insurance - Any other deductions not listed above

### Offsets

	<u>Item</u>	<u>Check if Applicable</u>	<u>Documentation/Information Required</u>
1.	Private Health Insurance	<input type="checkbox"/>	Statement from your health fund
2.	Superannuation contributions on behalf of your spouse	<input type="checkbox"/>	Documentation of the contribution from the superannuation fund
3.	Early stage investor	<input type="checkbox"/>	Records in relation to investments in qualifying early stage innovation businesses

### Other Information

	<u>Item</u>	<u>Check if Applicable</u>	<u>Documentation/Information Required</u>
1.	Spouse's Details	<input type="checkbox"/>	- Date of Birth - Tax File Number - Taxable Income - Fringe Benefits - Tax-free pensions/benefits - Foreign income - Reportable superannuation contributions (incl spouse's deductible personal super contributions paid by spouse) - Total net investment losses - Child support/maintenance payments
2.	Dependants	<input type="checkbox"/>	- Number of dependents as at 30 June 2023: _____ - Names of dependents - Date of birth of dependents
3.	Reportable Employer Superannuation Contributions (RESC)	<input type="checkbox"/>	Amounts of concessional superannuation contributions above the compulsory 10% influenced by yourself
4.	Motor Vehicles Acquired/Sold	<input type="checkbox"/>	- Purchase documents - Sale documents
5.	Child Maintenance expenditure	<input type="checkbox"/>	Child support/maintenance payments paid by you
6.	Working Holiday maker	<input type="checkbox"/>	Details of your working holiday visa subclass (417 or 462)

### Notes