

## 2014 INDIVIDUAL INCOME TAX RETURN CHECKLIST

**You are reminded that all income must be declared and all expenses claimed must be substantiated and supported by relevant receipts and/or diary records.**

Please circle **NO** or **YES** for each of the items listed below, sign the last page and **attach relevant documentation**.

<b>INCOME</b>	<b>NAME:</b>	<b>NAME:</b>
Salary or wages	NO/YES	NO/YES
Occupation:		
Allowances, earnings, tips, director's fees, etc	NO/YES	NO/YES
Lump sum payments	NO/YES	NO/YES
Termination payments & employment	NO/YES	NO/YES
Australian government allowances like Newstart, Youth Allowance & Austudy payment	NO/YES	NO/YES
Australian government pensions and allowances	NO/YES	NO/YES
Australian annuities and superannuation income streams	NO/YES	NO/YES
Australian superannuation lump sum payments	NO/YES	NO/YES
Personal services income	NO/YES	NO/YES
Any fringe benefits received from employer	NO/YES	NO/YES
Interest	NO/YES	NO/YES
Dividends – provide dividend advices received	NO/YES	NO/YES
Income from partnerships and/ or trusts – provide Annual statements received	NO/YES	NO/YES
Net income or loss from business	NO/YES	NO/YES
Employee share schemes	NO/YES	NO/YES
Deferred non-commercial business losses	NO/YES	NO/YES
Net farm management deposits or withdrawals	NO/YES	NO/YES
Sale of assets e.g. shares, units in trusts, property including sale of principal residence	NO/YES	NO/YES
<b>Acquisition details of assets sold – eg Date, cost, return of capital</b>	NO/YES	NO/YES
Direct or indirect interest in a controlled foreign entity	NO/YES	NO/YES
Transfer of property or services to a non-resident trust	NO/YES	NO/YES
Interest in a foreign investment fund (FIF) or a foreign life assurance policy (FLP)	NO/YES	NO/YES
Foreign source income (including foreign pensions) and foreign assets or property	NO/YES	NO/YES
Rental Income (if YES, complete Rental Property Questionnaire and worksheet available from our office or on our website).	NO/YES	NO/YES
Bonuses from life assurance or friendly society policy	NO/YES	NO/YES
Forestry managed investment scheme income	NO/YES	NO/YES
Other income (please specify)	NO/YES	NO/YES

### DEDUCTIONS

For all deductions, where there is private use, please indicate private percentage (%)

<b>Work –related car expense claims</b>		
- cents per kilometre method (max 5,000kms per car)	NO/YES	NO/YES
- log book method	NO/YES	NO/YES
- one-third of actual expenses method	NO/YES	NO/YES
- 12% of actual cost method	NO/YES	NO/YES
<b>Work- related travel expenses</b>		
Employee domestic travel under reasonable allowance - If the claim is more than the reasonable allowance rate, do you have receipts for your expenses?	NO/YES	NO/YES
Employee without a reasonable travel allowance - Did you incur and have receipts for airfares? - Did you incur and have receipts for accommodation? - Do you have receipts for hire cars (if applicable)? - Did you incur and have receipts for meals and incidental expenses? - Do you have any other travel expenses?	NO/YES	NO/YES

Overseas travel under reasonable allowance - Do you have receipts for accommodation expenses? - If travel is for 6 or more nights in a row, do you have travel records? (e.g. a travel diary)	NO/YES	NO/YES
Other overseas travel	NO/YES	NO/YES
Other work-related travel expenses, eg, borrowed car/rail/bus/taxi fares (please specify)	NO/YES	NO/YES
<b>Work-related uniform and other clothing expenses</b>		
Protective clothing	NO/YES	NO/YES
Occupation-specific clothing	NO/YES	NO/YES
Non-compulsory uniform	NO/YES	NO/YES
Compulsory uniform	NO/YES	NO/YES
Conventional clothing	NO/YES	NO/YES
Laundry (up to \$150 without receipts)	NO/YES	NO/YES
Dry cleaning	NO/YES	NO/YES
Other claims – mending/repairs, etc (please specify)	NO/YES	NO/YES
<b>Work-related self-education expenses</b>		
Course taken at educational institutions:		
- course fees	NO/YES	NO/YES
- travel	NO/YES	NO/YES
- books, stationery	NO/YES	NO/YES
- depreciation	NO/YES	NO/YES
- seminars	NO/YES	NO/YES
- other (please specify)	NO/YES	NO/YES
<b>Seminars and courses not at an educational institution</b>		
- course fees	NO/YES	NO/YES
- travel	NO/YES	NO/YES
- other (please specify)	NO/YES	NO/YES
<b>Other work-related expenses</b>		
Home office expenses	NO/YES	NO/YES
Computer and software	NO/YES	NO/YES
Telephone/mobile phone	NO/YES	NO/YES
Tools and equipment	NO/YES	NO/YES
Subscriptions and union fees	NO/YES	NO/YES
Journals/periodicals	NO/YES	NO/YES
Depreciation	NO/YES	NO/YES
Sun protection products (e.g., sunscreen, sunhat, sunglasses)	NO/YES	NO/YES
Any other work related deductions (please specify)	NO/YES	NO/YES
<b>Other types of deductions</b>		
Income protection insurance premium	NO/YES	NO/YES
Interest and dividend deductions	NO/YES	NO/YES
Gifts or donations of \$2 or more to eligible charities	NO/YES	NO/YES
Cost of managing taxation affairs	NO/YES	NO/YES
Deductible amount of undeducted purchase price (UPP) of a <b>foreign</b> pension or annuity	NO/YES	NO/YES
Forestry managed investment scheme deduction	NO/YES	NO/YES
Other deductions (please specify)	NO/YES	NO/YES
Tax losses of earlier income years	NO/YES	NO/YES
<b>Please attach all private health insurance statements for the financial year ending 30.6.14</b>		

<b>Superannuation</b>		
Did you make personal deductible contributions to a superannuation fund? If so, please provide the following details:- -Full name of Fund: -Policy no: -Fund ABN: -s290-170 notice received from your superannuation fund advising of tax deductible amounts	NO/YES	NO/YES
Did you make a personal contribution into a superannuation fund with the expectation of receiving the government co-contribution? If so, how much did you contribute as a non-concessional (non deductible) contribution?	NO/YES \$	NO/YES \$
<b>Tax Offset/rebates</b>		
Senior Australian	NO/YES	NO/YES
Did you receive a superannuation income stream?	NO/YES	NO/YES
Mature Age Worker (Over 55 & net income below \$63,000)	NO/YES	NO/YES
Private health insurance	NO/YES	NO/YES
Superannuation contributions on behalf of spouse	NO/YES	NO/YES
Do you live in remote zone or have served overseas with Defence Force in 2013/2014?	NO/YES	NO/YES
Did you have net medical expenses over the following: - \$2,162 for singles with income less than \$88,000 or families with income less than \$176,000 - \$5,100 for those with income above the thresholds	NO/YES	NO/YES
Parent, spouse's parent or invalid relative	NO/YES	NO/YES
Landcare & Water facility rebate unused from a previous year	NO/YES	NO/YES
Family Tax Benefit Part A and Part B - <b>Claim through Department of Human Services (Centrelink) once tax return completed</b> – now only 12 months to claim (i.e. by 30.06.2015)	NO/YES	NO/YES
Did you become an Australian tax resident at any time during the 2014 income year?	NO/YES	NO/YES
Did you cease to be an Australian tax resident at any time during the 2014 income year?	NO/YES	NO/YES
Are you entitled to a Medicare Levy exemption due to any one of the following circumstances applying during all or part of the year: -you were a blind pensioner -you received sickness allowance from Centrelink -you were entitled to full free medical treatment for all the conditions under defence force arrangements or Veteran's Affairs Repatriation Health Card (Gold Card) or repatriation arrangements	NO/YES	NO/YES
Did you have a HECS/HELP liability or a student supplement loan (e.g., SFSS) debt?	NO/YES	NO/YES
Other rebates (please specify)	NO/YES	NO/YES
Income Tests Information - extra information which may need to be reported this year for you and/or your spouse. (If "yes", please provide details). - Did you or your spouse have any total reportable fringe benefits? - Did you or your spouse have any reportable employer super contributions? - Did you or your spouse receive any tax free government pensions? - Did you or your spouse receive any target foreign income? - Did you or your spouse have a net financial investment loss? - Did you or your spouse have a net rental property loss? - Did you or your spouse pay child support?	NO/YES	NO/YES
Bank account details for refund	NO/YES	NO/YES
Even if we didn't prepare your spouse's income tax return, have you included details of your spouse's income including: - taxable income - reportable fringe benefits - Australian pensions and allowances	NO/YES	NO/YES
Number of dependent children?		

Dated the \_\_\_\_\_ day of \_\_\_\_\_ 20\_\_\_\_\_

\_\_\_\_\_  
**Signature of taxpayer**

\_\_\_\_\_  
**Signature of taxpayer**

\_\_\_\_\_  
**Name (print)**

\_\_\_\_\_  
**Name (print)**

**BANK DETAILS:**

**Account Name:** \_\_\_\_\_

**BSB:** \_\_\_\_\_

**Account Number:** \_\_\_\_\_