



**THOMAS GLC**  
CHARTERED ACCOUNTANTS  
& BUSINESS ADVISORS

**PRINCIPALS:**

CHRISTINE ANDREWS CPA  
GLENN MCEWEN CA  
GORDON OGBORNE CA  
LUCAS QUINLAN CA

**CONSULTANTS:**

KEVIN THOMAS FCA  
BRIAN THOMAS CA

**2009 INDIVIDUAL INCOME TAX RETURN CHECKLIST**

Please circle **NO** or **YES** for each of the items listed below, sign the last page and **attach relevant documentation**. This will assist in ensuring that all income and deductions are included in your tax return.

	NAME:	NAME:
<b>INCOME</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
Eligible termination payments	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
Deferred non-commercial business losses	NO/YES	NO/YES
Sale of assets eg shares, units in trusts, property	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>Other work- related travel expenses</b>		
Employee domestic travel under reasonable allowance	NO/YES	NO/YES
Employee without a reasonable travel allowance	NO/YES	NO/YES
Overseas travel under reasonable allowance	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
- 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
Sun protection products (eg, 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
Australian Film Industry incentives	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 private health insurance statement for the financial year ending 30.6.09</b>		



<b>Superannuation</b>		
Has any employer you have worked for during the year provided superannuation support?	NO/YES	NO/YES
If not, did you make personal contributions to a superannuation fund? If so, please provide the following details:- -Full name of Fund: -Policy no: -Fund ABN: -S82AAT notice received from your superannuation fund advising of tax deductible amounts	NO/YES	NO/YES
<b>Tax Offset/rebates</b>		
Senior Australian	NO/YES	NO/YES
Are you a pensioner?	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
30% private health insurance	NO/YES	NO/YES
Education tax refund -Are you eligible for Family Tax Benefit Part A If YES: -Number of primary school students -Number of secondary school students -Listing of eligible expenses incurred	NO/YES	NO/YES
<b>Baby Bonus</b> - Do you have a child that was born between 1/7/01 and 30/6/04? If YES, Name:- Date of Birth:-	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 2008/2009?	NO/YES	NO/YES
Did you have net medical expenses over \$1,500? Please provide details	NO/YES	NO/YES
Parent, spouse's parent or invalid relative	NO/YES	NO/YES
Landcare & Water facility rebate	NO/YES	NO/YES
Are you a 'small business entity' with an annual turnover of \$75,000 or less?	NO/YES	NO/YES
Family Tax Benefit Part A and Part B - <b>Claim through Centrelink once tax return completed.</b>		
Did you become an Australian tax resident at any time during the 2009 income year?	NO/YES	NO/YES
Did you cease to be an Australian tax resident at any time during the 2009 income year?	NO/YES	NO/YES
Did you have a HECS/HELP liability or a student supplement loan (e.g., SFSS) debt?	NO/YES	NO/YES
Did you receive any benefit from an employee share acquisition scheme?	NO/YES	NO/YES
Other rebates (please specify)	NO/YES	NO/YES

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

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

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

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

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