

**2022 - 2023**

## ANNUAL TAX CHECKLIST – Individual

Please use this checklist and include with your accounting records to ensure that all relevant information is provided to enable us to complete your tax work.

Name of Taxpayer: \_\_\_\_\_ TFN: \_\_\_\_\_

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

Contact No: \_\_\_\_\_ ABN: \_\_\_\_\_

Email address: \_\_\_\_\_

### GENERAL INFORMATION

ATTACHED

#### • Income

- Payment Summaries for any work performed or Details of employers to determine all information has been lodged with ATO
- Details on allowances, directors fees etc earned
- Dividend information (copies of dividend advices)
- Managed funds (copies of Annual Tax Statements)
- Interest received on personal bank accounts (copies of statements)
- Any other income received – Digital Currencies – Purchase/Trading

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#### • Deductions

- Work related expenses (copies of receipts)
- Work related car expenses (PLEASE NOTE: Motor Vehicles are now limited to the logbook method or 5000km business use) – **ATO AUDIT TARGET**

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#### CAR

Make/Model: \_\_\_\_\_

Rego: \_\_\_\_\_

Main Driver: \_\_\_\_\_

Opening + Closing Speedo: \_\_\_\_\_

- Superannuation contribution amount, policy number and copy of Notice of Intent Acknowledgement of Deduction by Superannuation Fund

**Please note that tax returns CANNOT be lodged without this acknowledgment of claiming a tax deduction. ATO Data matching in this area has increased.**

- Donations (Copies of receipts)
- Self education expenses (Copies of receipts)
- Receipts for purchase of uniforms/ protective clothing, laundry or dry cleaning – **ATO AUDIT TARGET**
- Income protection (Annual premiums paid)

#### • Private Health Cover

- Include a copy of your Annual Health Cover statement as issued by your private health cover provider – required prior to lodging tax return.

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#### • Rental Properties

- Income details or property agent statements
- Details on loans, showing interest on rental property
- Expenses relating to rental property
- Quantity Surveyors tax depreciation report (if applicable)
- Period of rental for 2022/23
- Address of Rental Property/s
- If purchased or sold during 2022/23, copies of settlement statement & contract
- If you have not previously supplied WCC with your purchase details, please provide them for us to keep on file for future capital gains tax purposes

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## ANNUAL TAX CHECKLIST – Individual

- **Capital Gains / Losses**

- Details of shares or units purchased and sold during the year
- Details of other assets purchased and sold during the year

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- Other

- Distributions from partnerships and/or trusts
- Net income or loss from business



NOTES:

The graph displays two functions on a coordinate plane with a grid. The x-axis and y-axis are both marked with grid lines every 1 unit. The red curve, representing  $y = x^2$ , is a parabola opening upwards with its vertex at the origin (0,0). The grey curve, representing  $y = -x + 4$ , is a straight line with a negative slope, intersecting the y-axis at (0,4) and the x-axis at (4,0). The two curves intersect at the points (0,0) and (3,9).