

Name:
Address:
Mobile:
Email:
Occupation:

Individual Tax Return 2021 Pre-Interview Checklist

Please review this checklist prior to your interview or sending us your tax records. This will make the completion of your tax return as fast and convenient as possible.

1.	Income	Yes	No	?	If yes, what records do you need to bring to interview or send to us?
1.1	Have you earned income from employment (salaries and wages) – include Eligible Termination Payments, if applicable?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	PAYG Payment Summaries (Group Certificate), ETP payment summaries (if applicable)
1.2	Have you received government pensions, allowances and payments?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Payment summaries and statements
1.3	Have you received an Australian annuity or Superannuation pension?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Payment summaries and statements
1.4	Did you receive interest from bank deposits, investment accounts etc?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Bank statements with details of interest received
1.5	Did you receive dividends from shares?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Dividend statements
1.6	Did you receive distributions from a partnership or trust (trusts include managed funds)?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Distribution statement or tax return (if applicable) from partnership or trust. Annual Tax Statements from Managed Funds.
1.7	Did you earn income from a business?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Details of business income received (may be in separate financial system)
1.8	Did you sell assets which may involve a capital gain e.g. investment property/shares?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Details of assets sold including selling price, original purchase price and any selling costs
1.9	Did you earn income from foreign sources?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Details of income earned – statements, certificates, bank transactions
1.10	Did you hold rental property during the year?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Rental income schedule – may be on bank statements (direct deposits)
1.11	Did you earn any other income which may need to be included in your tax return?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Details of income

2.	Work Related Expenses	Yes	No	?	If yes, what records do you need to bring to interview or send to us?
2.1	Have you incurred any motor vehicle expenses relating to your work?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Logbooks, odometer readings, receipts for vehicle expenses (if claiming per klm a log book is not needed but description helpful)
2.2	Did you incur travel costs through your work?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Receipts for travel costs, travel diaries
2.3	Did you purchase work related clothing e.g. protective equipment, registered uniforms?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Receipts for clothing purchases
2.4	Did you incur work related study expenses?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Details of course, receipts for study costs
2.5	Did you incur expenses relating to interest and dividends received?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Receipts or statements for expenses incurred
2.6	Did you incur expenses relating to an allowance received?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Receipts for expenses (in some cases, receipts may not be necessary)

2.7	If you received rental income, did you incur expenses relating to this property?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Details of all property expenses e.g. interest on borrowings, rates, repairs, real estate fees
2.8	Did you buy/use your own equipment for work purposes?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Receipts for purchases, repairs, insurance and operating costs
2.9	Did you pay premiums on income protection insurance during the year?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Premium costs and insurance policy
2.10	Did you make personal contributions to a complying superannuation fund? * If yes Please contact your fund ASAP to avoid delays in lodgement.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Your return cannot be lodged until you have lodged a Notice of Intent to claim a deduction with your super fund and receive an acknowledgement.
2.11	Did you incur other work related expenses?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Bring receipts - see examples of other expenses below

Examples of Other Expense Deductions (These are Not Exhaustive)

Union Fees	Seminars, conferences, books and journals and training
Sun protection products	Home office expenses for income producing purposes
Meals when working overtime	Professional bodies fees and subscriptions
Sickness, Accident or Income Protection Insurance	Gifts or donations to registered charities
Telephone/Computer & Software for Work	Tools for work purposes
Interest to ATO for late payment of income tax	Tax agent fees and travel to tax agent

3.	Other	Yes	No	?	If yes, what records do you need to bring to interview or send to us?
3.1	Did you have a spouse (married or de facto) ?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Spouse's DOB & taxable income (if we do not prepare their return) and any exempt income.
3.2	Do you have dependants and/or pay child support?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Children's names, DOB, student Y/N, dependant's income, \$ amt paid child support
4.	Tax Offsets	Yes	No	?	If yes, what records do you need to bring to interview or send to us?
4.1	Did you receive any government pension or allowance e.g. single parenting payment, senior Australian, veteran or a war widow/er	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Pension statements, details of yours and your spouse's income and expenses for year
4.2	Did you have private health insurance at any time during the financial year?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Medical insurance tax statements
4.3	Did you live in a remote locality for any part of the year?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Name/s of locality and dates you lived there
4.4	Did you incur medical expenses relating to disability aids, attendant care or aged care?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Receipts for all medical expenses
4.5	Did you serve as a member of Australia's Defence forces or with United Nations forces?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Details of service and localities served
4.6	Did you make superannuation contributions on behalf of your spouse during the year?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Superannuation fund statements
4.7	Did you have a dependant who is an invalid or carer of an invalid?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Details of dependent, income they receive, time you cared for them

The Tax Office no longer issues refunds by cheque. Bank details are required to receive a refund if applicable:

BSB _____ Account No. _____