



IEC ADVISORY
INNOVATIVE | EXPERIENCED | COMMITTED

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2023 Individual Income Tax Return Checklist

Name: _____

Individual Details – Please provide evidence	Yes	No	Unsure
1. Did you have a spouse for the 2023 Financial Year? If yes, please answer the following: Name: Spouse's Date of Birth: Spouse's Taxable Income:			
2. Did you have a change in marital status during the income year?			
3. Do you have any dependents living with you? If yes, please list the number of dependents you have:			
4. Did you buy or sell any property or capital assets during the income year? (E.g., Shares, rental property, main residence) If yes, please provide details:			
Superannuation 5. Could you please provide yours and your spouse's most recent superannuation statement.			
6. Did you or your spouse make any concessional contributions towards your Superannuation Fund for the 2023 Financial Year? If yes has this been lodged with your superannuation fund? If you have contributed funds, have you completed the Notice of Intent to claim form and please provide the acknowledgement of receipt of the notice, that the fund would have provided you.			
7. Did you and your spouse/dependents have any Personal Insurance (Life/Total and Permanent Disability and or Income Protection) in place for the 2023 financial year? If yes, could you please provide the annual statement provided by your Insurance Provider			
8. In the case of a refund please provide your following bank details (only if different to prior years) Account Name: BSB: Account Number:			

Part B – Please tick the relevant box and provide copies of relevant documentation

Income – Please provide evidence	Yes	No	Unsure
Income			
1. Gross Interest If answered yes, please provide a summary of the interest earned for each bank account for the financial year.			
2. Dividends If yes, please provide your dividend statements for the year			
3. Distributions from partnerships and/or trusts If yes, please provide relevant documentation (Distribution statements)			
4. Personal services Income (PSI). Did you receive income under your ABN which was for the provision of personal services? (E.g., Labor component of contract is >50%) If yes, please provide advise our firm so we can contact you to ensure we receive the relevant information.			
5. Net income or loss from business (as a sole trader) If yes, please provide a summary of your income and expenses.			
6. Rent If yes, please refer to our Rental Checklist to ensure that you include all relevant documents.			
9. Other income (Please specify below)			



Deductions – Please provide evidence	Yes	No	Unsure
D1. Work related car expenses			
– Cents per kilometre method (up to a maximum of 5,000 work related kms) If yes, you will need to provide some form of record to show the trips that you were required to make for work purposes			
– Logbook method If yes, please provide a copy to our firm (of both the logbook and summary of all of your motor vehicle expenses).			
D2. Work related travel expenses			
Employee domestic travel with a reasonable travel allowance			
– Please provide the receipts for your expenses.			
Employee without a reasonable travel allowance			
Other work-related travel expenses – If answered yes please provide receipts			
(Please specify)			
D3. Work related uniform and other clothing expenses – If answered yes please provide relevant receipts			
Protective clothing			
Occupation specific clothing			
Uniform			
Dry cleaning expenses			
Other claims			
D4. Work related self-education expenses – If answered yes please provide relevant receipts			
Course taken at educational institution:			
– Union fees			
– Course fees			
– Books, stationery			
Other Specify			



Deductions – Please provide evidence	Yes	No	Unsure
D5. Other work-related expenses - Working from Home Expenses			
<p>Please note there have been legislative changes for Working from Home expenses. Please see here for fact sheet</p>			
<p>When evidencing the total number of hours worked during an income year, taxpayers are required to keep a record (e.g., a diary) showing the total number of hours they worked from home during the year, as follows:</p> <ul style="list-style-type: none"> (a) For the 2023 income year, an individual needs to keep: <ul style="list-style-type: none"> - a record which is representative of the total number of hours worked from home during the period from 1 July 2022 to 28 February 2023; and - a record of the total number of actual hours worked from home for the period 1 March 2023 to 30 June 2023. (b) For the 2024 and later income years – an individual needs to keep a record for the entire income year of the number of hours they worked from home during that year. <p>This means that from 1 March 2023, the ATO will no longer accept an estimate of hours worked, based on the number of hours worked from home during a particular period (e.g., for a four week period) and applied to the rest of the income year.</p> <p>A record of hours worked from home can be used in the form of timesheets, rosters, time tracking apps, or a diary or similar document.</p>			
<p>Electricity</p> <p>If you were working from home, we can claim Electricity costs under either the ATO's revised fixed rate method OR the Actual cost method.</p> <p>If you could like us to assess the actual cost method, please provide a copy of your electricity bills for the relevant period and details of the hours worked.</p> <p>Alternatively under the revised fixed rate method we will need the diary of hours worked as referenced above.</p>			
<p>Internet</p> <p>If you were working from home, we can claim Internet costs under either the ATO's revised fixed rate method OR the Actual cost method.</p> <p>If you could like us to assess the actual cost method, please provide a copy of your Internet bills for the relevant period and details of the hours worked.</p> <p>Alternatively under the revised fixed rate method we will need the diary of hours worked as referenced above.</p>			



Deductions – Please provide evidence	Yes	No	Unsure
Telephone If you were working from home, we can claim Telephone costs under either the ATO's revised fixed rate method OR the Actual cost method. If you could like us to assess the actual cost method, please provide a copy of your Telephone bills for the relevant period and details of the hours worked. Alternatively under the revised fixed rate method we will need the diary of hours worked as referenced above.			
Stationary and Computer Consumables (e.g. printer ink and paper) If you were working from home, we can claim Stationary and Consumables costs under either the ATO's revised fixed rate method OR the Actual cost method. If you could like us to assess the actual cost method, please provide a copy of your stationary and computer consumables receipts for the relevant period and details of the hours worked. Alternatively under the revised fixed rate method we will need the diary of hours worked as referenced above.			
D5. Other work-related expenses – If answered yes please provide relevant receipts and documents			
Subscriptions and union fees			
Tools and equipment including office furniture			
Other types of deductions – If answered yes please provide relevant receipts and documentation.			
D7. Interest deductions			
D8. Dividend deductions			
D9. Gifts or donations			
D10. Cost of managing tax affairs			
D12. Personal superannuation contributions			
D15. Other deductions (please specify)			

Additional Notes You would like to ensure we are aware of?

Signed.....

Date.....