



Individual Tax Return Checklist

PLEASE BRING YOUR PHOTO ID TO YOUR TAX APPOINTMENT

PERSONAL DETAILS

Name:			
Status:	New Client	Existing Client	Returning Client

Address:			
Suburb:	State:	Postcode:	

TFN:	ABN:	DOB:
Marital Status:		Contact Number:
Email:		

Main Occupation:		
Bank Account Name:	BSB:	Account Number:

Was last year's tax return prepared by a registered Tax Agent?	Yes	No
Did you sign an Electronic Funds Declaration on your last lodged tax return?	Yes	No

INCOME

Note: Please complete this section with information NOT REPORTED to the ATO

Details	Gross	Tax	Allowances	RFB	RESC
Payer:					
ABN:					

DEDUCTIONS

Note: Please ensure you have receipts for all items showing the date, and cost

Vehicle Expenses (log book/cents per km method)	Yes	No
<i>*If claiming over \$4,400 (5,000kms x 88c), then log book method will be required.</i>	Amount \$ _____	
Work-related Uniforms/Protective Clothing	Yes	No
<i>*Inc. PPE such as sunscreen/hats/sunglasses. Must be compulsory for employment.</i>	Amount \$ _____	
Laundry/Dry-Cleaning/Alterations	Yes	No
<i>*Dry-Cleaning and Alteration receipts must be provided.</i>	Amount \$ _____	

Did you purchase any of the following relating to earning your income throughout the relevant financial year?			
Books/Journals/Industry Magazines	Amount \$ _____	Yes	No
Computer Software	Amount \$ _____	Yes	No
Tools/Equipment	Amount \$ _____	Yes	No
Union fees/subscriptions/donations? (Chat GPT/Claude/MS365)	Amount \$ _____	Yes	No
Work-related Self-Education: Seminars/Courses/Training	Amount \$ _____	Yes	No
Collate your receipts and provide a description of the item, and the cost of each individual item			

Did you work from home throughout the relevant financial year?	YES	NO
<i>*From 01/07/2022 – Home Office expenses must have a diary for all hours worked from home. Fixed Rate Method of 70c per hour or the Actual Cost Method.</i>		
Fixed Rate Method (includes; home and mobile internet/data/usage costs, electricity and gas for heating, lighting and cooling, stationery and computer consumables such as printer ink and paper).	Total Hours Worked: _____	

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Actual Cost Method, please provide the following:	
Details of Internet/phone plans (in relation to business %)	Amount \$ _____
Depreciation for any assets decline in value	Amount \$ _____
Records of electricity/gas expenses for heating, cooling and lighting	Amount \$ _____
Records of any stationery and computer consumables (printer ink, paper)	Amount \$ _____
Records of any cleaning records for your home office	Amount \$ _____

Did you contribute funds to your superannuation fund that you'd like to claim as a deduction? <i>*If yes, please supply details</i> Amount Contributed: \$	YES	NO
Did you make any contributions to your spouse's superannuation fund? <i>*If yes, please supply details</i> Amount Contributed: \$	YES	NO
Did you pay for any Income Protection Insurance (outside of your superannuation) <i>*Supply details.</i> Amount: \$	YES	NO
Do you have private health HOSPITAL COVER?	YES	NO
How many days where you covered between 1 st July and 30 th June? <i>Note: We have access to this information through the ATO.</i>	_____ Days	

If you have other income or expenses you believe to be relevant, please supply the information and we will determine if/how much is claimable.

ADDITIONAL PAYMENTS RECEIVED

Income from foreign employment? (Circle) <i>*If yes, please provide the relevant income statement.</i>	YES	NO
Allowances, benefits, earnings, tips, director's fees, etc.? (Circle) <i>*If yes, please provide details of received amounts.</i>	YES	NO
	Amount: \$ _____	
Employer Lump Sum Payments/Unused Annual or Long Service Leave/Employment Termination Payments? (Circle) <i>*If yes, please provide details of received amounts.</i>	YES	NO
	Amount: \$ _____	
Government Allowances (including JobSeeker, Youth Allowance, Austudy, Abstudy, etc.)? (Circle)	YES	NO
	Amount: \$ _____	
Government Pensions or Allowances; including Single Parenting Payment? (Circle)	YES	NO
Australian Annuities and Superannuation Income Streams?	YES	NO
Australian Superannuation Lump Sum Payments?	YES	NO
Attributable Personal Services Income?	YES	NO
Interest from bank accounts? Bank: _____	YES	NO
	Amount: \$ _____	
Partnership/Trust Income/Managed Funds Income? <i>*If yes, please provide details of received amounts.</i>	YES	NO
Do you have shares/dividends or did you purchase/sell any in the last financial year? <i>*If yes, please provide your annual statement detailing franked/unfranked amounts.</i>	YES	NO
Are you a part of any Employee Share Schemes?	YES	NO
Do you have an active ABN and did you receive income under that ABN. <i>*Please supply details of income and expenses.</i>	YES	NO

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Did you have a capital gain event occur in the relevant financial year: E.g. Crypto transactions, purchase/sale of shares, purchase/sale of property <i>*If yes, please provide details of purchase and sale amounts/contracts.</i>	YES	NO
Did you receive income from investment properties (rental/Airbnb) <i>*If yes, please supply information on income and expenses</i>	YES	NO