

## Individual Income Tax Return Checklists

In order to prepare your individual tax return efficiently, please follow this checklist to collect your documents. This will save time for both of us and also save cost for you, as we will not need to request further information from you, and not delay the processing of your return.

**Please ensure that you will complete ALL relevant questions and provide additional information if needed. Please also provide related documents together with this list.**

### Personal Details

Full Name MR/MRS/MS/MISS .....

Date of Birth (DD/MM/YYYY) ..... Tax File Number .....

Address .....

Occupation .....

Email ..... Phone .....

Medicare Card Number: .....

Are you an Australian Resident for tax purpose: YES / NO / UNSURE

Do you have private health insurance cover? YES / NO (if YES, please provide annual tax summary from your insurer)

In case of a tax refund, do you wish to use electronic funds transfer? YES / NO

If YES, please provide your bank details (**PLEASE MAKE SURE THE ACCOUNT IS CORRECT**):

Account Holder Name .....

BSB Number ..... Account Number .....

Please also provide following details of your spouse if we don't prepare his or her tax return:

Full Name MR/MRS/MS/MISS .....

Date of Birth (DD/MM/YYYY) .....

Adjusted Taxable Income .....

Do you have any dependent child(ren)? YES / NO If YES, how many? .....

Child 1 Name: ..... Date of Birth (DD/MM/YYYY): .....

Child 2 Name: ..... Date of Birth (DD/MM/YYYY): .....

Income	YES	NO	UNSURE
<b>Please tick and provide related paperwork.</b>			
Salary/Wages (including workcover/paid parental leave)			
Allowances, tips, director fees etc			
Employment termination payment			
Employer lump sum payment (e.g. pro rata annual leave)			
Australian Government allowances & payments (e.g. newstart, youth allowance, and austudy payments)			
Australian Government pensions and allowances			
Australian superannuation pensions or lump sum payments			
Bank interest income			
Dividends from companies in Australia (including any dividend reinvestment)			
Employee share schemes			
Distributions from partnerships and/or trust			
Personal Service Income or Business Income			
Foreign source income (including pensions) and income from foreign assets or property			
Income from rental properties (Annual Rental Statement)			
Sale of assets (with potential Capital Gains Tax implications)			
Life Assurance Bonus			
Insurance Payout			
Have you received any other kind of income? (please provide details if YES)			

Other Income:

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Work Related Deductions	YES	NO	UNSURE
<b>Please tick and provide related paperwork.</b>			
Motor Vehicle Expense			
Travel expenses in relation to your work and employment			

Protective clothing for work			
Work related or occupation specifically required clothing			
Laundry expenses			
Sun protection related products			
Professional membership fees			
Union fee			
Self education			
Conference and/or Seminar expenses			
Books, journals and professional libraries or subscriptions			
Telephone, mobile phone and/or internet for work/business related			
Home office (Please provide hours for work usage per week)			
Computers/software for work related usage			
Car parking and tolls			
Expenses in relation to allowances received			
Working overtime meals cost			
Equipment and/or tools expenses			
Please provide details of other work related expenses paid and not listed above			

Other Expenses Incurred:

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Other Deductions	YES	NO	UNSURE
<b>Please tick and provide related paperwork.</b>			
Gifts or donations to charity within Australia			
Expenses in relation to dividend or interest income			
Tax agent fee for previous year's return			
Distance travelled to tax agent for tax affairs last year			
Income protection insurance cost			
Interest or dividend related deduction			
Superannuation contributions paid by self-employed person			

Tax losses carried forward			
School and building fund donations			
Please provide details of other deductions paid and not listed above			

Other Deductions:

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Tax Offsets and Rebates	YES	NO	UNSURE
<b>Please tick and provide related paperwork.</b>			
Do you have a dependent spouse?			
Did you make any superannuation contributions on behalf of your spouse?			
Did you have out of pocket medical expenses over \$2,000 for your family?			
Are you a pensioner?			
Did you live in a remote area of Australia?			
Expenses spent on primary and secondary child(ren)'s education. (see our education tax offset sheet)			
Are you exempt from Medicare Levy, or have a Medicare Levy reduction?			
Have you received your 30% Private Health Insurance rebate upfront?			
Do you have Higher Education Loan Program (HELP) Debt?			
Have you made any PAYG Instalment payments?			

Please provide any other information you think that we should be informed:

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I confirm that the above information provided is true and correct to the best knowledge of myself and that where necessary I will supply documentary evidence in support of my claims.

Client Signature:..... Date .....