

INDIVIDUAL INCOME TAX RETURN CHECKLIST

Full Name	
Tax File Number	
Date of Birth	
ABN (if applicable)	
Address	
Address (Postal) (Put 'as above' if the same)	
Telephone contacts	Mobile:
	Business Hours (work) :
	After Hours (home):
Email	
Electronic banking Details (for refund if applicable)	BSB:
	Account Number:
	Account Name:
Main Occupation	
Spouse Name and TFN	



Income

- Salary or wages
- Allowances, earnings, tips, director's fees etc
- Employer lump sum payments
- Employment termination payments
- Australian Government allowances and payments
- Australian Government pensions and allowances
- Australian annuities and superannuation income streams
- Australian superannuation lump sum payments
- Attributed personal services income
- Gross Interest
- Dividends
- Employee share schemes
- Distributions from partnerships and/or trusts
- Personal services income (PSI)
- Net income or loss from business (as a sole trader)
- Deferred non-commercial business losses
- Net farm management deposits or repayments
- Capital gains
- Foreign entities:
 - Direct or indirect interests in controlled foreign company
 - Transfer of property or services to a non-resident trust.....
- Foreign source income (including foreign pensions) and foreign assets or property
- Rent
- Bonuses from life insurance companies or friendly societies
- Forestry managed investment scheme income
- Other income (please specify below)

Deductions

Work Related Car Expenses

- Cents per kilometre method (up to a maximum of 5,000 kms)
- Log book method

Work Related Travel Expenses

Employee domestic travel with reasonable allowance

- If the claim is more than the reasonable allowance rate, do you have receipts for your expenses?

Overseas travel with reasonable allowance

- Do you have receipts for accommodation expenses?
- If travel is for 6 or more nights in a row, do you have travel records? (e.g. a travel diary)..

Employee without a reasonable travel allowance

- Did you incur and have receipts for airfares?.....
- Did you incur and have receipts for accommodation?
- Do you have receipts for hire cars (if applicable)?
- Did you incur and have receipts for meals and incidental expenses?
- Do you have any other travel expenses?

Other work-related travel expenses (e.g. a borrowed car)

(please specify)

.....
.....

Work Related Uniform and Other Clothing Expenses

- Protective clothing
- Occupation specific clothing
- Non-compulsory uniform
- Compulsory uniform
- Conventional clothing
- Laundry expenses (up to \$150 without receipts)
- Dry cleaning expenses
- Other claims such as mending/repairs, etc (please specify)

Work related self-education expenses

Course taken at educational institution:

- Union fees
- Course fees
- Books, stationery

- Depreciation
- Travel
- Other (please specify)

Other Work Related Expenses

- Home office expenses
- Computer and software
- Telephone/mobile phone
- Tools and equipment
- Subscriptions and union fees
- Journals/periodicals
- Depreciation
- Sun protection products (i.e. sunscreen and sunglasses)
- Seminars and courses not at an educational institution:
 - Course fees
 - Travel
 - Other (please specify)
- Any other work related deductions (please specify)

Other types of deductions

- Low value pool deduction
- Interest deductions
- Dividend deductions
- Gifts or donations
- Cost of managing tax affairs
 - Interest charged by the ATO (e.g. Shortfall or General Interest Charge)
 - Litigation costs
 - Other expenses incurred in managing tax affairs
- Deductible amount of undeducted purchase price of a foreign pension or annuity
- Personal superannuation contributions

Full name of fund: Account no:

Fund ABN: Fund TFN:

Have you provided the fund a notice of intention to deduct the contribution?

Has this notice been acknowledged by the fund?
- Deduction for project pool
- Forestry managed investment scheme deduction

- Other deductions (please specify)
- Tax losses of earlier income years

Tax Offsets/Rebates – Please provide evidence if applicable

Are you a senior Australian or a pensioner?

Did you receive an Australian superannuation income stream?

Did you make superannuation contributions on behalf of your spouse?

Did you live in a remote area of Australia or serve overseas with the Australian defence force or the UN armed forces?

Did you maintain a dependant who is unable to work due to invalidity or carer obligations?

Are you entitled to claim the landcare and water facility tax offset?

Did you make a contribution to an early stage venture capital limited partnership personally, or as an investor in a partnership or trust?

Did you acquire newly issued shares in a qualifying 'early stage innovation company' personally, or as an investor in a partnership or trust?

Other refundable tax offsets (please specify)

Other Relevant Information

- Are you entitled to the Medicare levy exemption or reduction?
(If yes, please specify):
- Did you have private health insurance?
(If yes, please provide the annual statement received from your health fund)
- Were you under the age of 18 on 30 June 2022
- Did you become an Australian tax resident at any time during the income year?
- Did you cease to be an Australian tax resident at any time during the income year? ...
- Did you make a non-deductible (non-concessional) personal super contribution?
- Do you have a HELP liability, Student Financial Supplement Loan debt, Student Start-up Loan debt or Trade Support Loan debt?
- Are you a working holiday maker in Australia on a 417 (working holiday) visa or 462 (work and holiday) visa?
- Did a trust or company distribute income to you in respect of which Family Trust Distribution Tax (FTDT) was paid by the trust or company?
- Do you have a loan with a private company or have such a loan amount forgiven?
- Did you receive any benefit from an employee share acquisition scheme?

- Income tests information
 - Do you have any total reportable fringe benefits amounts?
 - Do you have any reportable employer superannuation contributions?
 - Did you receive any tax-free government pensions?.....
 - Did you receive any target foreign income?.....
 - Did you have a net financial investment loss?
 - Did you have a net rental property loss?
 - Did you pay child support?.....
 - Number of dependent children?
- Spouse details (if applicable)
 - Did you have a spouse for the full year from 1 July 2021 to 30 June 2022?.....
 - If you had a spouse for only part of the income year, please specify the dates between 1 July 2021 to 30 June 2022 when you had a spouse:
 - From ____ / ____ / _____ to ____ / ____ / _____
 - Did your spouse die during the income year?
 - What was your spouse's taxable income for the income year (excluding any first home Super Save released amounts)? \$.....

- Does your spouse have a share of trust income on which the trustee is assessed under Section 98 that has not been included in your spouse's taxable income.....
- Did a trust or company distribute income to your spouse in respect of which family trust distribution tax was paid by the trust or company?
- Did your spouse have any reportable fringe benefits amounts?
- Did your spouse receive any Australian Government pensions or allowances (not including exempt pension income)?
- Did your spouse receive any exempt pension income?
- Does your spouse have any reportable super contributions?
- Did your spouse receive any tax-free government pensions paid under the *Military Rehabilitation and Compensation Act 2004*?
- Did your spouse receive any 'target foreign income'?
- Did your spouse have a total net investment loss (i.e. the total of any financial investment loss and a rental property loss)?
- Did your spouse pay child support?
- If your spouse is 55 to 59 years old, did they receive a superannuation lump sum (other than a death benefit) that included a taxed element that does not exceed their low rate cap?

Signature of Taxpayer

Dated

Name (Print)



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