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**INFORMATION FOR TAX RETURN CHECKLIST –**

**INDIVIDUAL**

**For year ended 30th June 2019**

**NAME \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**ADDRESS: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

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**TFN: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**PHONE NO. DAYTIME: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_AFTER HOURS \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**OCCUPATION: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ DATE OF BIRTH; \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**EMAIL ADDRESS: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

|  |  |
| --- | --- |
| **NAMES OF DEPENDANT CHILDREN** | **DATE OF BIRTH** |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |

**INCOME:**

**1. PAYG Summaries** (including Pensions/Centrelink) 

No. of Summaries Attached: \_\_\_\_\_

**2. Other Salary Income** (includes Director’s fees, commissions etc)

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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1. **Termination Payments** (if you received a lump sum termination, please provide

Eligible Termination Statement.



**4.** **Interest** (money received on your bank accounts/term deposits)

**Name of Account No. Total Interest TFN Joint**

**Bank Received $ Withholding $ Account?**

**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

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**5. Dividends:** Please provide copies of dividend statements of income received.

Income from dividend reinvestment plans also need to be included and declared in

your returns. (Please ensure the payment date is between 01/07/2017 – 30/06/2018)

**6.** **Trusts and Partnership**: (I.e. examples of Trust income are BT Funds, Merrill

Lynch etc.) Please provide documents to show income from the funds you list below.

**Fund Name Amount Received**

**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

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1. **Capital Gains.** Did you sell any assets such as shares or property which were acquired after 20 September 1985?



If yes, then please provide documentation of when it was purchased, cost and also

documents on sale and funds received etc.

1. **Employee Share Scheme**

Did you receive any benefit from an employee share acquisition.

Yes No

If yes, please provide copies of documents.

**9.** **Rental Income:** Please attach details of the amount of rent received and all

expenses in their separate categories. Please supply loan and purchase documents if you acquired property after 1 July 2016 or refinanced an existing loan

List of rental properties, attaching all information for each.

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**10.** **Any other Income:** any income you received in the financial year which doesn’t fit

into any of the above categories. ( Please provide details).

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**DEDUCTIONS**

**1.** **Motor Vehicle**: Did you use your own car for business/work purposes throughout the

year?



If yes, please provide one of the following:

* **If you haven’t kept a log book**, but use your car for business related travel, please provide us with how many kilometers you have traveled on business related travel. The maximum the tax office allows you to claim is 5,000 km for the year.

Kilometres travelled: \_\_\_\_\_\_\_\_ Engine size (in litres, i.e. 1.6) \_\_\_\_\_\_\_\_

* **If you have kept a logbook** please provide a copy of your log book.

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* If you have a **loan** for the vehicle, please provide details of the interest you paid over the year, and the cost of the car when purchased. If you car has been **purchased since 1 July 2018**, we will need to see a contract of sale and hire purchase (loan) or lease documents.

Also please provide a list of all expenses you have incurred over the financial year, including fuel, repairs and maintenance, registration and insurance etc.

**2. Work Uniform:** Do you wear a corporate uniform or protective clothing. If yes, did you purchase any new items? (If so please provide details. Include Safety Boots, sunglasses, sunscreen, hats etc.)

**3**. **Other Work Related Deductions: (attach list if necessary)**The ATO is watching and checking these claims closely. ATO audit activity is [significant](https://www.cpaaustralia.com.au/podcast/ato-spotlight-on-work-related-expenses). Make sure you have receipts/paperwork to support work-related  expenses such as uniforms, training courses, and learning materials, as these may be tax-deductible.

* Diary/Stationery/Work materials \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Union Fees/Professional bodies \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Income, Sickness & Accident Insurance \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Home Office costs \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Donations/School building fund \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Telephone & internet costs \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Computer costs \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**\_\_\_\_\_\_\_\_\_\_\_**
* Seminar costs/Self Education \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Note:** If you are paying off your Self Education fees through HELP or a Student

Financial Supplement Loan or PELS, please provide us with your statements

to include in your return.

**REBATES;**

**1**. **Private Health Insurance:** Do you have Private Health Insurance?

 

If yes, please provide us with a copy of the health fund statement sent you to after the end of the financial year. This will tell us if you are entitled to a rebate, and enter details of the policy into your return.

**2**. **Spouse** Did you have a spouse for the full financial year?

 

If you had a spouse for only part of the income year, please specify the dates between 1 July 2018 and 30 June 2019 when you had a spouse.

From / / to / /

If we are not preparing your spouse’s tax return, please provide the following where applicable:

Spouse taxable income: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Salary sacrifice amount

(Reportable Fringe Benefits on Payment Summary) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**-4-**

Fringe Benefit amounts, \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Exempt Pension income \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Investment loss (ie rental property loss) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Child support paid \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Does your spouse receive any benefits from Centrelink, including FTB Part A and B.

 

If yes, please let us know whether it is Part A and/or Part B and level of income that

Centrelink have based their payments on for the year.

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***Please note that FTB Part A and B can no longer be claimed through your tax return as a lump sum, and needs to be applied for online with Centrelink after you have received your notice of assessment***.

1. **Superannuation**

Please provide a copy of correspondence from your superannuation fund confirming your entitlement to a deduction, if you wish to claim a deduction for a personal super contribution.

**BANK ACCOUNT DETAILS (ATO requirement when expecting refund)**

Account Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

BSB: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Account Number: \_\_\_\_\_\_\_\_\_\_\_\_\_