

## Individual Income Tax Return Checklist

Tax File Number: ...../ ..... /..... ABN: .....

Are you an Australian resident? YES/NO/UNSURE.....

**Name:**

Mr/Mrs/Ms/Miss: .....

Name changed since last return? YES/NO If YES, previous name:

**Our fee will be \$** **[Pay by cash/EFTPOS/Take out from Refund]**

**Postal Address:** .....

.....

**Date of birth:** ..... /..... / .....

**Telephone:** (H) ..... (W) ..... (M) .....

**Email:** .....

**Occupation:** .....

**Spouse details** (if applicable): .....

**Do you want to use Electronic Funds Transfer?** YES/NO

If YES, provide bank details BSB: ..... Account Number: .....

Account name: .....

***Please circle YES or NO for each of the items listed below:***

**INCOME – Please provide evidence**

- 1. Salary or wages .....YES/NO
- 2. Allowances, earnings, tips, director’s fees etc .....YES/NO
- 3. Employer lump sum payments .....YES/NO
- 4. Employment termination payments .....YES/NO
- 5. Australian Government allowances and payments like newstart, youth allowance and Austudy payment .....YES/NO
- 6. Australian Government pensions and allowances .....YES/NO
- 10. Reportable fringe benefits amounts .....YES/NO
- 11. Interest .....YES/NO
- 12. Dividends .....YES/NO
- 13. Distributions from partnerships and/or trusts .....YES/NO
- 14. Personal services income (PSI) .....YES/NO
- 15. Net income or loss from business .....YES/NO
- 18. Net capital gains .....YES/NO
- 19. Interests in a foreign investment fund (FIF) or a foreign life assurance policy (FLP) .....YES/NO
- 21. Rent .....YES/NO



- 23. Forestry managed investment scheme income ..... YES/NO
- 24. Other income (please specify) ..... YES/NO

**DEDUCTIONS – Please provide evidence**

**D1. Work related car expenses**

- cents per kilometre method (up to a maximum of 5,000 kms) ..... YES/NO
- log book method ..... YES/NO
- one-third of actual expenses method ..... YES/NO
- 12% of actual cost method ..... YES/NO

**D2. Work related travel expenses**

- Employee domestic travel with reasonable allowance ..... YES/NO
  - If the claim is more than the reasonable allowance rate, do you have receipts for your expenses? ..... YES/NO
- Overseas travel with reasonable allowance ..... YES/NO
  - Do you have receipts for accommodation expenses? ..... YES/NO
  - If travel is for 6 or more nights in a row, do you have travel records? (e.g. a travel diary)... YES/NO
- Employee without a reasonable travel allowance ..... YES/NO
  - Did you incur and have receipts for airfares? ..... YES/NO
  - Did you incur and have receipts for accommodation? ..... YES/NO
  - Do you have receipts for hire cars (if applicable)? ..... YES/NO
  - Did you incur and have receipts for meals and incidental expenses? ..... YES/NO

**D3. Work related uniform and other clothing expenses**

- Protective clothing ..... YES/NO
- Occupation specific clothing ..... YES/NO
- Non-compulsory uniform ..... YES/NO
- Compulsory uniform ..... YES/NO
- Conventional clothing ..... YES/NO
- Laundry expenses (up to \$150 without receipts) ..... YES/NO
- Dry cleaning expenses ..... YES/NO
- Other claims such as mending/repairs, etc (please specify) ..... YES/NO

**D4. Work related self-education expenses**

Course taken at educational institution:

- union fees ..... YES/NO
- course fees ..... YES/NO
- books, stationery ..... YES/NO

- depreciation ..... YES/NO
- seminars ..... YES/NO
- travel ..... YES/NO
- other (please specify) ..... YES/NO

**D5. Other work related expenses**

- Home office expenses ..... YES/NO
- Computer and software ..... YES/NO
- Telephone/mobile phone ..... YES/NO
- Tools and equipment ..... YES/NO
- Subscriptions and union fees ..... YES/NO
- Journals/periodicals ..... YES/NO
- Depreciation ..... YES/NO
- Sun protection products (i.e., sunscreen and sunglasses) ..... YES/NO
- Seminars and courses not at an educational institution:
  - course fees ..... YES/NO
  - travel ..... YES/NO
  - other (please specify) ..... YES/NO
- Any other work related deductions (please specify) ..... YES/NO

**Other types of deductions**

- D6. Low value pool deduction ..... YES/NO
- D7. Interest and dividend deductions ..... YES/NO
- D8. Gifts or donations ..... YES/NO
- D9. Cost of managing tax affairs ..... YES/NO
- D10. Australian film industry incentives ..... YES/NO
- D11. Deductible amount of undeducted purchase price of a foreign pension or annuity ..... YES/NO
- D12. Personal superannuation contributions ..... YES/NO
  - Full name of fund: ..... Account no: .....
  - Fund ABN: ..... Fund TFN: .....
- D13. Deduction for project pool ..... YES/NO
- D14. Forestry managed investment scheme deduction ..... YES/NO
- D15. Other deductions (please specify) ..... YES/NO
- L1. Tax losses of earlier income years ..... YES/NO

**Tax offsets/rebates**

- T1. Do you have a dependent spouse (without dependent child or student), a housekeeper or a child-housekeeper?..... YES/NO <sup>1</sup>
- T2. Are you a senior Australian? ..... YES/NO
- T3. Are you a pensioner? ..... YES/NO
- T4. Did you receive a superannuation income stream? ..... YES/NO
- T5. Did you have private health insurance in 20 ? ..... YES/NO
- T6. Do you have a child that was born or adopted between 1 July 2001 and 30 June 2004? YES/NO
- T7. Did you make superannuation contributions on behalf of your spouse? ..... YES/NO
- T8. Did you live in a remote area of Australia or serve overseas with the Australian defence force or the UN armed forces in 20 ? ..... YES/NO
- T9. Did you have net medical expenses over \$1,500? ..... YES/NO
- T10. Did you maintain a parent, spouse's parent or invalid relative?..... YES/NO
- T11. Are you entitled to claim the landcare and water facility tax offset? ..... YES/NO
- T12. Are you a mature age worker with 'net income from working' of less than \$63,000?..... YES/NO
- T13. Are you a 'small business entity' with an annual turnover of \$75,000 or less? ..... YES/NO
- T14. Other tax offsets (please specify) ..... YES/NO

<sup>1</sup> **These tax offsets may not be available where the taxpayer is eligible to claim FTB Part B.**

### Other relevant information

- A. Are you entitled to the Medicare levy exemption or reduction in 20 ? ..... YES/NO
- B. Did you become an Australian tax resident at any time during the 2008 income year?..... YES/NO
- D. Do you have a HECS/HELP liability or a student supplement loan debt? ..... YES/NO
- I. Family Tax Benefit ('FTB'):
- Did you have care of a dependent child in 20 ?..... YES/NO
  - Did you or your spouse receive FTB through the Family Assistance Office in 20 ? ..... YES/NO

**Notes:**

I hereby request that you may prepare my tax return from the information that has been provided on this form. I believe the information that I have given to be correct, to the best of my knowledge.

.....  
**Signature of taxpayer**

.....  
**Name (print)**

**Dated the .....day of .....20.....**

