

2022 Personal Tax Return Checklist				Office Use Only - Queries & To Do Items			
Name				<input type="checkbox"/> Before Commencing, Download ATO Pre-Filling Report			
Address				<input type="checkbox"/>			
				<input type="checkbox"/>			
DOB	/ /	TFN		<input type="checkbox"/>			
Tel Home		Tel Mob		<input type="checkbox"/>			
Email				<input type="checkbox"/>			
Occupation				<input type="checkbox"/>			
BSB (if refund)		Acct No		<input type="checkbox"/>			
Acct Name				<input type="checkbox"/>			
Income Checklist to be Completed by Client				Deductions			
Please indicate income received		Yes	No	D1 Work Related Car Expenses		Yes	No
Salary or wages including insurance for lost wages				Rate per Km	Reas. est up to 5,000 kms <u>per car</u>		
Allowances, earnings, tips, director's fees etc				Log Book	Log book valid for 5 years only		
Employment termination payments				1/3 Expenses	min 5,000 annualised bus kms		
Australian Government allowances				12% of Cost	min 5,000 annualised bus kms		
Australian Government pensions							
Annuities and superannuation income streams							
Superannuation lump sum payments							
Interest							
Dividends				D2 Work Related Travel Expenses		Yes	No
Discount(s) on employee shares or rights				(a) <u>Domestic</u> travel & <u>reasonable allowance</u>			
Income from partnerships or trusts				Claim greater than reasonable allowance?			
Income from managed funds (investments)				If yes, has receipts for all deductions claimed			
Income from your own business				(b) <u>Overseas</u> travel & <u>reasonable allowance</u>			
Deferred losses from your business (new clients only)				Has receipts for accommodation (must have)			
Net farm management deposits or repayments				Claim greater than reasonable allowance?			
Sale of assets (main residence, shares, property, etc)				If yes, has receipts for all deductions claimed			
Foreign income (including pensions)				(c) <u>No travel allowance</u> & has receipts			
Rental income				(d) Travel for <u>6 or more nights in a row</u>			
Life insurance company or friendly society bonuses				Has a travel diary (unless domestic travel and claiming less than the reasonable amount)			
Farm management deposits or withdrawals				(e) Taxis			
Forestry managed investment scheme income				(f) Parking & tolls			
Other income not shown above (show details below)				(g) Train & bus fares			
				D3 Work Related Clothing		Yes	No
				Protective clothing & footwear			
				Occupation-specific clothing			
				Compulsory uniform			
				Non-compulsory uniform regd with AusIndustry			
				Home laundry (max \$150 without receipts)			
				Dry cleaning			
				Repairs and/or alterations to uniforms			
STOP! We will complete the remaining questions.							
Please sign & date below							
X _____		/	/				
Client Signature		Date					

Deductions Continued				Tax Offsets		Yes	No
D4 Self-education Expenses (formal qualifications)				Yes	No		
Course Name				T1 Seniors & Pensioners			
Location				T2 Australian superannuation income stream			
Nexus with current work activities satisfied				T3 Spouse superannuation contributions			
Student union fees				T4 Live in remote zone/serve in overseas forces			
Course fees (not HECS-HELP, HELP or SFSS)				T5 Net medical expenses (over \$2,218 or \$5,233)			
Tuition fees (FEE-HELP, VET FEE-HELP, OS-HELP)				Must have claimed in both 2018 and 2019 returns or claiming disability aids or attendant or aged care			
Textbooks				T6 Invalid & invalid carer			
Stationery				T7 Landcare and water facility			
Home office & decline in value of computer				T8 Other non-refundable tax offsets			
Travel – engine capacity of car & kms	___ Litre	___	Kms	T9 Other refundable tax offsets			
D5 Other Work Related Expenses				Yes	No		
Computer expenses and software				Other Information			
Depreciation of computers & other equipment				Yes	No		
Home office (\$0.45/hr for heating, cooling, lighting & depn)				Rental property & land tax paid if applicable			
Internet access				Building worker reg'd for long service leave if applic			
Overtime meals (max \$28.20 per meal without receipts)				Number of dependant children			
Postage				Private Health Insurance Held – get annual statement			
Reference books, technical magazines & journals				If not covered – does family income exceed threshold			
Safety Equipment (hard hats, safety glasses & sunscreen)				If covered – is the whole family covered			
Seminars, courses, conferences & workshops				Became or ceased being a resident during year			
Stationery				Under 18 years of age at 30/06/2020 (complete A1)			
Subscriptions				HELP debt \$	SFSS debt \$		
Telephone – home				PAYG Instalment Credits		\$	
Telephone – mobile				Tax-free government pensions (for income tests)		\$	
Tools and equipment				Child support paid (for income tests)		\$	
Union fees				Spouse Details (if we are not preparing that return)			
				Name:		Date of Birth / /	
				Dependant from	/ /	Dependant to	/ /
Other Deductions				Yes	No		
D6 Low value pool deductions				Taxable Income		Reportable FBs	
D7 Interest deductions				Govt Pensions Item 6		Exempt Pensions	
D8 Dividend deductions				Net Invest. Loss		Child Support Paid	
D9 Gifts or donations				Reportable Super		Target Foreign Inc	
D10 Cost of managing tax affairs including GIC				Comments			
D11 Deductible amount for foreign pensions							
D12 Personal superannuation contributions							
D13 Project pool deductions							
D14 Forestry managed investment schemes							
D15 Other (incl income protection insur, net psi loss)							
L1 Losses from earlier income years				<u>Preparer's Signature</u>		/ / Date	