

2023 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 <b>per car</b>		
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			
<b>STOP! We will complete the remaining questions.</b>				Compulsory uniform			
<b>Please sign &amp; date below</b>				Non-compulsory uniform regd with AusIndustry			
				Home laundry (max \$150 without receipts)			
				Dry cleaning			
				Repairs and/or alterations to uniforms			
X _____		/	/				
Client Signature		Date					

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