

# Individual Income Tax Return Checklist

## INCOME

**Have you received any of the following payments:**

Please tick where applicable

- |   |                          |
|---|--------------------------|
| 1 Salary or wage from employment, including any allowances as indicated on a payment summary/group certificate? | <input type="checkbox"/> |
| 2 Any allowances, earnings, tips, directors fees, honorarium etc. not included on your payment summary?         | <input type="checkbox"/> |
| 3 Employer lump sum payments, eg. Redundancy?   | <input type="checkbox"/> |
| 4 Employment termination payment statement (ETP)?   | <input type="checkbox"/> |
| 5 Youth Allowance, Newstart, Austudy, Sickness or other allowances?   | <input type="checkbox"/> |
| 6 Government pensions & other allowances - Age Pension, Sole Parent etc.?                                       | <input type="checkbox"/> |
| 7 Australian Pensions or Annuities or income stream?  | <input type="checkbox"/> |
| 8 Australian superannuation lump sum payments?  | <input type="checkbox"/> |
| 9 Attributed personal services income?  | <input type="checkbox"/> |
| 10 Interest from any source in Australia, eg. bank accounts or term deposits?                                   | <input type="checkbox"/> |
| 11 Dividends from companies in Australia, incl. any reinvested?   | <input type="checkbox"/> |
| 12 Share or options under an employee share scheme?   | <input type="checkbox"/> |
| 13 Distributions from Partnerships or Trusts that you are a beneficiary of?                                     | <input type="checkbox"/> |
| 14 Income as a sub-contractor?  | <input type="checkbox"/> |
| 15 Net income or loss from carrying on a business?  | <input type="checkbox"/> |
| 16 Do you have any unclaimed business losses from previous years?   | <input type="checkbox"/> |
| 17 Any net farm management deposits or withdrawals?   | <input type="checkbox"/> |
| 18 Have you sold or disposed of any asset, eg. shares, house, land, precious metals or foreign assets?          | <input type="checkbox"/> |
| 19 Do you have any interests in foreign entities?   | <input type="checkbox"/> |
| 20 Income from a foreign pension, annuity, employment or pension?   | <input type="checkbox"/> |
| 21 Did you receive rent or was your property made available for rent?   | <input type="checkbox"/> |
| 22 Did you receive any bonuses from Life Companies and Friendly Societies?                                      | <input type="checkbox"/> |
| 23 Did you have any forestry managed investment scheme income?  | <input type="checkbox"/> |
| 24 Do you have any other income not described above? (please specify)   | <input type="checkbox"/> |

## DEDUCTIONS

**Work Related Car Expenses:**

- |  |                          |
|--|--------------------------|
| D1 Did you use your car for work, other than travel from home to work? | <input type="checkbox"/> |
| - Cents per km method  | <input type="checkbox"/> |
| - Log book method (please bring a copy of your logbook)                | <input type="checkbox"/> |
| - Other method   | <input type="checkbox"/> |

**Work Related Travel Expenses:**

- |   |                          |
|---|--------------------------|
| D2 Did you travel for your employment and were not reimbursed by your employer? | <input type="checkbox"/> |
| - Do you have a travel diary for travel more than 6 continuous nights?          | <input type="checkbox"/> |
| - If you claiming more than the reasonable limit please provide receipts.       | <input type="checkbox"/> |
| - Other work related travel, such as hiring a car?                              | <input type="checkbox"/> |

**Work Related Uniform & Other Clothing Expenses:**

- |  |                          |
|--|--------------------------|
| D3 Do you have a work related uniform that is compulsory, occupation specific or protective clothing? laundry and dry cleaning expenses? | <input type="checkbox"/> |
| - Did you incur costs for laundry or drycleaning?  | <input type="checkbox"/> |
| - If you were required to work outside, did you purchase any sun protection products such as hats, sunglasses, sunscreen?                | <input type="checkbox"/> |

**Work Related Self Education Expenses:**

- |   |                          |
|---|--------------------------|
| D4 Did you undertake study in relation to your employment which you paid for? | <input type="checkbox"/> |
| - Did you travel to undertake the study?                                      | <input type="checkbox"/> |
| - Did you incur costs for books, fees or other items?                         | <input type="checkbox"/> |

**Other Work Related Expenses:**

- D5 Any other work related expenses such as union fees, professional subscriptions, work related tools or equipment, telephone, computer, internet, stationery, seminars or conferences?
- D6 Did you work from home and incur any home office expenses?
- D7 Do you have expenses relating to interest such as loans or bank fees?
- D8 Do you have expenses relating to dividends, such as loans or bank fees?
- D9 Gifts or donations to charitable organisations?
- D10 Do you have costs related to your tax affairs such as fees to prepare you return?
- D11 Deductible amount of undeducted purchase of a foreign pension or annuity?
- D12 Personal superannuation contributions as a self-employed person?
- D13 Deduction for project pooled assets?
- D14 Forestry managed investment scheme deduction?
- D15 Other deductions, incl. income protection/accident insurance?


**LOSSES**

- L1 Do you have any tax losses of earlier income years?

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**TAX OFFSETS**

- T1 Do you have a Spouse (without dependent child or student) who is dependant on you?
- T5 Do you have private health insurance and have you claimed the govt. 30% rebate as a reduction to your premium?
  
- T6 Education tax refund - did you care for children in primary or secondary school and you were entitled to Family Tax Benefit (FTB) Part A for the children? If Yes, did you incur expenses in purchasing a laptop or home computer, printer, educational software, home internet, computer repairs, textbooks, stationery, or tools for a secondary trade course?
- T7 Did you make superannuation contributions on behalf of your spouse? Excl. super co-contributions.
- T8 Have you lived or worked in remote areas or in overseas forces?
- T9 Have you paid medical expenses in excess of \$2000 (after rebates from Medicare and private health funds) for your family?
- T10 Do you care for a parent, spouse's parent or invalid relative?
- T11 Landcare and water facility rebate?
- T12 Net income from working?
- T13 Entrepreneurs tax offset?
- T14 Other tax offsets?


**ADJUSTMENTS**

- A1 Were you Under 18 during the year?
- A2 Did you start or cease to be an Australian resident during the year?
- A3 Did you make a superannuation co-contribution?
- A4 Amount on which family tax distribution tax has been paid?


**RENTAL PROPERTY INCOME/DEDUCTIONS**

**If you have a rental property, please request a copy of our rental property checklist.**

**SIGNATURE OF TAXPAYER**

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**Name (Print)** \_\_\_\_\_

**Date:** \_\_\_\_\_