

Tax Return Checklist

Tax File Number: _____

Name: Mr/Mrs/Ms/Miss: _____

Postal Address: _____

Date of birth: ____/____/____

Telephone: (M) _____ (H) _____

Email: _____

Occupation: _____

Spouse details: Name: _____ Date of Birth: ____/____/____ Income: _____

Bank details BSB: _____ Account Number: _____

Account name: _____

Private Health Insurance Fund Details(attach tax letter): _____

INCOME – Please provide evidence

1. PAYG Payment Summary	YES/NO
4. Employment termination payments	YES/NO
5. Australian government allowances like Newstart, youth allowance and Austudy	YES/NO
6. Australian Government pensions and allowances	YES/NO
7. Australian annuities and superannuation income streams	YES/NO
8. Australian Superannuation lump sum payments	YES/NO
10. Gross Interest	YES/NO
11. Dividends	YES/NO
15. Net income or loss from business	YES/NO
18. Net capital gains	YES/NO
20. Foreign source income (including foreign pensions) and foreign assets or property	YES/NO
21. Rent	YES/NO
24. Other income (please specify)	YES/NO

Other relevant information

D. Do you have a HECS/HELP liability or a student supplement loan (e.g., SFSS) debt? YES/NO



DEDUCTIONS – Please provide evidence

Amount \$

D1. Work-related car expenses

log book method, cents per kilometre, 1/3 actual expense or 12% of actual cost \$

D2. Work-related travel expenses

Domestic or Overseas travel \$

Other work-related travel expenses, e.g., borrowed car \$

D3. Work-related, occupation specific or protective clothing

Protective clothing \$

Occupation-specific clothing \$

Laundry (up to \$150 without receipts) \$

Dry cleaning \$

Other claims – mending/repairs, sunglasses etc (please specify) \$

D4. Work related self-education expenses

– course fees \$

– books, stationery \$

– travel \$

D5. Other work related expenses

Home office expenses \$

Computer and software \$

Telephone/mobile phone \$

Tools and equipment \$

Subscriptions, Journals and union fees \$

Depreciation \$

Seminars and courses \$

Any other work deductions (please specify) \$

Other types of deductions

D9. Gifts or donations \$

D10. Cost of managing tax affairs \$

D15. Other deductions (please specify) \$