

INDIVIDUAL INCOME TAX RETURN CHECKLIST

Full Name	
Tax File Number	
Date of Birth	
ABN (if applicable)	
Address	
Address (Postal) (Put 'as above' if the same)	
Telephone contacts	Mobile:
	Business Hours (work) :
	After Hours (home):
Email	
Electronic banking Details (for refund if applicable)	BSB:
	Account Number:
	Account Name:
Main Occupation	
Spouse Name and TFN	



Income

- Salary or wages YES/NO
- Allowances, earnings, tips, director's fees etc YES/NO
- Employer lump sum payments YES/NO
- Employment termination payments YES/NO
- Australian Government allowances and payments YES/NO
- Australian Government pensions and allowances YES/NO
- Australian annuities and superannuation income streams YES/NO
- Australian superannuation lump sum payments YES/NO
- Attributed personal services income YES/NO
- Gross Interest YES/NO
- Dividends YES/NO
- Employee share schemes YES/NO
- Distributions from partnerships and/or trusts YES/NO
- Personal services income (PSI) YES/NO
- Net income or loss from business (as a sole trader) YES/NO
- Deferred non-commercial business losses YES/NO
- Net farm management deposits or repayments YES/NO
- Capital gains YES/NO
- Foreign entities:
 - Direct or indirect interests in controlled foreign company YES/NO
 - Transfer of property or services to a non-resident trust..... YES/NO
- Foreign source income (including foreign pensions) and foreign assets or property YES/NO
- Rent YES/NO
- Bonuses from life insurance companies or friendly societies YES/NO
- Forestry managed investment scheme income YES/NO
- Other income (please specify below)..... YES/NO

Deductions

Work Related Car Expenses

- Cents per kilometre method (up to a maximum of 5,000 kms) YES/NO
- Log book method YES/NO

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
- Do you have any other travel expenses? YES/NO

Other work-related travel expenses (e.g., a borrowed car) YES/NO
(please specify)

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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

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
- travel YES/NO
- other (please specify) YES/NO

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

- Low value pool deduction..... YES/NO
 - Interest deductions YES/NO
 - Dividend deductions YES/NO
 - Gifts or donations YES/NO
 - Cost of managing tax affairs YES/NO
 - Deductible amount of undeducted purchase price of a foreign pension or annuity YES/NO
 - Personal superannuation contributions YES/NO
- Full name of fund: Account no:
- Fund ABN: Fund TFN:
- Do you pass the 10% test? YES/NO
- Have you provided the fund a notice of intention to deduct the contribution? YES/NO
- Has this notice been acknowledged by the fund? YES/NO
- Deduction for project pool YES/NO
 - Forestry managed investment scheme deduction YES/NO
 - Other deductions (please specify) YES/NO
 - Tax losses of earlier income years YES/NO

Offsets and Refunds

Are you a senior Australian or a pensioner?.....YES/NO

Did you receive an Australian superannuation income stream?YES/NO

Did you make superannuation contributions on behalf of your spouse?YES/NO

Did you live in a remote area of Australia or serve overseas with the Australian defence force or the UN armed forces in 2017?.....YES/NO

Did you have net medical expenses in 2017?YES/NO

If so, do these medical expenses include expenses relating to disability aids, attendant care or aged care expenses?YES/NO

Did you maintain a dependant who is unable to work due to invalidity or carer obligations?.....YES/NO

Are you entitled to claim the landcare and water facility tax offset?YES/NO

Other non-refundable tax offsets (please specify).....YES/NO

Other refundable tax offsets (please specify).....YES/NO

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Other Relevant Information

- Are you entitled to the Medicare levy exemption or reduction in 2017?YES/NO
(If yes, please specify):
- Did you have private health insurance in 2017?YES/NO
(If yes, please provide the annual statement received from your health fund)
- Were you under the age of 18 on 30 June 2017?.....YES/NO
- Did you become an Australian tax resident at any time during the income year?YES/NO
- Did you cease to be an Australian tax resident at any time during the income year?.....YES/NO
- Did you make a non-deductible (non-concessional) personal super contribution?.....YES/NO
- Do you have a HECS/HELP liability or a student financial supplement loan debt?YES/NO
- Did a trust or company distribute income to you in respect of which Family Trust Distribution Tax (FTDT) was paid by the trust or company?.....YES/NO
- Do you have a loan with a private company or have such a loan amount forgiven?YES/NO
(If yes, please specify) (reviewer consider if deemed dividend in year under Division 7A)
- Did you receive any benefit from an employee share acquisition scheme?YES/NO
- Family Tax Benefit ('FTB'):
 - Did you have care of a dependent child in 2017?.....YES/NO
 - Did you or your spouse receive FTB in 2017?YES/NO
- Income tests information
 - Do you have any total reportable fringe benefits amounts in 2017?YES/NO
 - Do you have any reportable employer superannuation contributions in 2017?.....YES/NO
 - Did you receive any tax-free government pensions in 2017?.....YES/NO
 - Did you receive any target foreign income in 2017?.....YES/NO
 - Did you have a net financial investment loss in 2017?.....YES/NO
 - Did you have a net rental property loss in 2017?YES/NO
 - Did you pay child support in 2017?.....YES/NO
 - Number of dependent children?
- Spouse details (if applicable)
 - Did you have a spouse for the full year from 1 July 2016 to 30 June 2017?.....YES/NO
 - If you had a spouse for only part of the income year, please specify the dates between 1 July 2016 to 30 June 2017 when you had a spouse:
 - From ____ / ____ / _____ to ____ / ____ / _____
 - What was your spouse's taxable income for the 2017 income year? \$.....
 - Does your spouse have a share of trust income on which the trustee is assessed under Section 98 that has not been included in your spouse's taxable income.....YES/NO
 - Did a trust or company distribute income to your spouse in respect of which family trust distribution tax was paid by the trust or company for the 2017 income year?YES/NO
 - Did your spouse have any reportable fringe benefits amounts for the 2017 income year?.....YES/NO

- Did your spouse receive any Australian Government pensions or allowances (not including exempt pension income) in the 2017 income year?.....YES/NO
- Did your spouse receive any exempt pension income in the 2017 income year?.....YES/NO
- Does your spouse have any reportable super contributions for the 2017 income year?YES/NO
- Did your spouse receive any tax-free government pensions paid under the *Military Rehabilitation and Compensation Act 2004*?YES/NO
- Did your spouse receive any 'target foreign income' in the 2017 income year?YES/NO
- Did your spouse have a total net investment loss (i.e., the total of any financial investment loss and a rental property loss) for the 2017 income year?YES/NO
- Did your spouse pay child support during the 2017 income year?.....YES/NO
- If your spouse is 55 to 59 years old, did they receive a superannuation lump sum (other than a death benefit) during the 2017 income year that included a taxed element that does not exceed their low rate cap?YES/NO

Signature of Taxpayer

Dated

Name (Print)

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