

# Checklist

Client Name: \_\_\_\_\_ Address: \_\_\_\_\_  
Tax File No. \_\_\_\_\_ ABN: \_\_\_\_\_  
Telephone No. \_\_\_\_\_ (H) \_\_\_\_\_ (M) \_\_\_\_\_ (B) \_\_\_\_\_ (F)  
Date of Birth: \_\_\_\_\_ Email Address: \_\_\_\_\_  
Change in Marital Status : \_\_\_\_\_ Change of Address: \_\_\_\_\_  
Change in Occupation: \_\_\_\_\_ Details: \_\_\_\_\_

## INCOME

- PAYG Income  N  Y  O
- Newstart, Sickness or other Allowances  N  Y  O
- Aust. Government Pensions or other Allowances  N  Y  O
- Salary & Wages  N  Y  O
- Lump Sum Payments (including Superannuation)  N  Y  O
- Eligible Termination Payments  N  Y  O
- Other Australian Pensions or Annuities  N  Y  O
- Veterans Affairs Pension  N  Y  O
- Any other income including  N  Y  O 
  - Allowances – shown on Group Certificates  N  Y  O
  - Other Allowances – benefits, earnings, tips directors fees etc.  N  Y  O
  - Kilometre reimbursement for Car Expenses  N  Y  O
- Interest  N  Y  O
- Income from Partnerships and/or Trusts  N  Y  O
- Net Income or Loss from Business  N  Y  O
- Net Capital Gains  N  Y  O
- Foreign Income & Foreign Assets or Property  N  Y  O
- Rent  N  Y  O
- Dividends  N  Y  O
- Imputation Credits  N  Y  O
- Bonuses - Life Assurance or Friendly Society Policy  N  Y  O
- Working Holiday Makers Income  N  Y  O
- Other Income (please specify)  N  Y  O

## DEDUCTIONS

### Work Related Car Expense Claims

- Rate per km method  N  Y  O
- Log Book method (A detailed log book kept)  N  Y  O

### Other Work Related Travel Expenses

- Employee domestic travel with reasonable allowances  N  Y  O
- Employee claiming actual expenses  N  Y  O
- Travel for 6 or more nights in a row  N  Y  O 
  - Do you have a travel diary?  N  Y  O
- Overseas travel under reasonable allowances  N  Y  O 
  - Do you have a diary and accommodation receipts?  N  Y  O
- Apportioning private/business travel  N  Y  O 
  - deductible percentage  N  Y  O

### Uniform/Protective Clothing Expenses

- Protective Clothing – Replacement  N  Y  O
- Occupation Specific Clothing – Replacement  N  Y  O
- Non-compulsory Uniform – Replacement  N  Y  O
- Compulsory Uniform – Replacement  N  Y  O
- Laundry (Standard Calc. \$1 or 50c per load up to \$150)  N  Y  O
- Dry Cleaning  N  Y  O
- Other Claims (mending/polishing etc.)  N  Y  O

## Self Education Expenses

- Course taken at Educational Institution  N  Y  O 
  - Course Fees  N  Y  O
  - Travel  N  Y  O
  - Other  N  Y  O
- Seminars and Courses not at an Educational Institution  N  Y  O 
  - Course Fees  N  Y  O
  - Travel  N  Y  O
  - Other  N  Y  O

## Other Expenses

- Sunscreen, sunglasses etc.  N  Y  O
- Home Office Expenses  N  Y  O
- Computer & Software  N  Y  O
- Telephone/Mobile Phone/Internet  N  Y  O
- Tools & Equipment  N  Y  O
- Subscriptions & Union Fees  N  Y  O
- Journals/Periodicals  N  Y  O
- Depreciation  N  Y  O
- Expenses in relation to Allowances  N  Y  O
- Any other Work Deductions  N  Y  O
- Union Fees  N  Y  O

## OTHER DEDUCTIONS

- Gifts of \$2 or more to eligible Charities  N  Y  O
- Tax Agent Fees for previous year  N  Y  O
- Undeducted Purchase Price of Annuity  N  Y  O
- Personal Super Contributions  N  Y  O

## REBATES/OFFSETS

- Zone Rebate (Resident in Zone Only)  N  Y  O
- Dependent (Invalid and Carer) Tax Offset  N  Y  O
- Senior & Pensioners Tax Offset  N  Y  O
- Low Income Rebate  N  Y  O
- Private Health Insurance Rebate  N  Y  O
- Other Rebates  N  Y  O
- Rebate for Spouse Superannuation  N  Y  O

## OTHER INFORMATION

If you had a partner during the tax year please provide us with their full names, taxable income and date of birth.

