

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

DEDUCTIONS

Work Related Car Expense Claims

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

Other Work Related Travel Expenses

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

Uniform/Protective Clothing Expenses

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

Self Education Expenses

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

Other Expenses

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

OTHER DEDUCTIONS

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

REBATES/OFFSETS

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

OTHER INFORMATION

- If you had a partner during the tax year please provide us with their full names, taxable income and date of birth.
- Please ensure you have all relevant substantiation to support your claim

