

Individual Tax Return Checklist

This checklist is generic and not all items will apply to your situation.

Full Name: _____ Date: _____ / _____ / 202

Please tick YES or NO and provide the related Documentation, Statements or Details to our office for processing

Income	YES	NO
Did you receive Wages/Salary from your employer or any income lodged via your MyGov account?	<input type="checkbox"/>	<input type="checkbox"/>
Did you receive any earnings or fees, allowances, tips, director fees etc?	<input type="checkbox"/>	<input type="checkbox"/>
Did you receive any Government Pensions or Allowances, Super Pensions, Annuities or similar?	<input type="checkbox"/>	<input type="checkbox"/>
Did you receive interest from your Bank Accounts, Building Society Investments or Private Loans?	<input type="checkbox"/>	<input type="checkbox"/>
Did you receive income from any Rental or Investments you own?	<input type="checkbox"/>	<input type="checkbox"/>
Did you receive dividends from the shares you own?	<input type="checkbox"/>	<input type="checkbox"/>
Did you receive any foreign income?	<input type="checkbox"/>	<input type="checkbox"/>
Did you receive any other income ie Capital Gains, Sale of Shares, Crypto Currency? Provide all Buy/Sells.	<input type="checkbox"/>	<input type="checkbox"/>
Did you pay or receive Child Support?	<input type="checkbox"/>	<input type="checkbox"/>
Did you receive distributions from Partnerships, Trusts or Annual Tax Statement from Managed Funds?	<input type="checkbox"/>	<input type="checkbox"/>
Did you earn any income from ABN business or contracts?	<input type="checkbox"/>	<input type="checkbox"/>

Expenses and Deductions

Did you use your car for work purposes? Yes, provide logbook with expenses or estimation of KM	<input type="checkbox"/>	<input type="checkbox"/>
Provide Tax Receipts for work related travel and accommodation expenses?	<input type="checkbox"/>	<input type="checkbox"/>
Provide Tax Receipts for work related expenses including uniform, protective clothing, tools, stationery, education, professional subscriptions, union fees, telephone, internet, or anything else work related? Advise percentage of work use versus personal use.	<input type="checkbox"/>	<input type="checkbox"/>
Provide Tax Receipts for gifts or donations to registered charities?	<input type="checkbox"/>	<input type="checkbox"/>
Did you have any investment expenses including financial advisor fees, bank fees or investment borrowings?	<input type="checkbox"/>	<input type="checkbox"/>
Did you pay any Accounting Fees last year (outside of this office)?	<input type="checkbox"/>	<input type="checkbox"/>
Did you or your spouse make any additional superannuation contributions? Please provide <i>Intent to Claim</i> form.	<input type="checkbox"/>	<input type="checkbox"/>
Have you paid premiums for Income Protection Insurance?	<input type="checkbox"/>	<input type="checkbox"/>
Did you have any rental income and expenses? Rental Property Tax Checklist if you had any rental property investments this year	<input type="checkbox"/>	<input type="checkbox"/>

General

Use of Home Office – Did you work from home? How many hours per week? How many weeks worked per year?	<input type="checkbox"/>	<input type="checkbox"/>
Please provide a copy of last year's Income Tax Return (if not processed by our office)	<input type="checkbox"/>	<input type="checkbox"/>
Please provide BSB and Account Number to process any owed Tax Refund	<input type="checkbox"/>	<input type="checkbox"/>
Please provide Spouse Details including name, DOB and Taxable Income if they are not completing their Tax Return at our office	<input type="checkbox"/>	<input type="checkbox"/>

Other Notes for Accountant: _____