

## TAX RETURN CHECKLIST – INDIVIDUAL

**For year ended 30<sup>th</sup> June 2023**

**NAME** \_\_\_\_\_

**ADDRESS:** \_\_\_\_\_  
\_\_\_\_\_

**MOBILE NUMBER:** \_\_\_\_\_ **OTHER PHONE NUMBER** \_\_\_\_\_

**OCCUPATION:** \_\_\_\_\_ **DATE OF BIRTH;** \_\_\_\_\_

**EMAIL ADDRESS:** \_\_\_\_\_

NAMES OF DEPENDANT CHILDREN	DATE OF BIRTH

### **MyGOV ACCOUNT:**

Do you have a myGov account?

Yes  No

Are the bank accounts details recorded on MyGov correct?

Yes  No

If not correct, could you please update the information directly with the ATO. Please call us if any queries

### **INCOME:**

1. **PAYG Summaries** - has your employer finalized your payment summary with the ATO (including Pensions/Centrelink)

Yes  No

2. **Other Salary Income** (includes Director's fees, commissions etc)

\_\_\_\_\_  
\_\_\_\_\_

3. **Other Income – cash:** Cash received for goods or services provided must be declared as income. Please provide details

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4. **Termination Payments** (if you received a lump sum termination, please provide Eligible Termination Statement.

Yes  No

5. **Interest** - money received on your bank accounts/term deposits

Name of Bank	Account No. (last three digits only)	Total Interest Received \$	TFN Withholding \$	Joint Account?
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6. **Dividends:** Please provide copies of dividend statements. Income from dividend reinvestment plans also need to be included and declared in your returns. (Please ensure the payment date is between 01/07/2022 – 30/06/2023)

7. **Trusts and Partnership:** (I.e. examples of Trust income are BT Funds, Merrill Lynch etc.) Please provide documents to show income from the funds you list below.

Fund Name	Amount Received
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8. **Capital Gains.** Did you sell any assets such as shares or property?

Yes  No

If yes, then please provide documentation of when it was purchased, cost and also documents on sale and funds received etc.

9. **Employee Share Scheme**

Did you receive any benefit from an employee share acquisition.

Yes  No

If yes, please provide copies of documents.

10. **Rental Income:** List of rental properties, attaching all information for each.

Please attach details of the amount of rent received and all expenses in their separate categories. Please supply loan and purchase documents if you acquired property after 1 July 2022 or refinanced an existing loan

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11. **Any other Income:** any income you received in the financial year which does not fit into any of the above categories. Please provide details.

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**DEDUCTIONS**

1. **Motor Vehicle:** Did you use your own car for business/work purposes throughout the year?

Yes  No

If yes, please provide one of the following:

**If you haven't kept a log book**, but use your car for business related travel, please provide us with how many kilometers you have traveled on business related travel. The maximum the tax office allows you to claim is 5,000 km for the year.

Kilometres travelled: \_\_\_\_\_

**If you have kept a logbook** please provide a copy of your log book. The log book should not be more than five years old.

If you have a **loan** for the vehicle, please provide details of the interest you paid over the year, and the cost of the car when purchased. If your car has been **purchased since 1 July 2022**, we will need to see a contract of sale and hire purchase (loan) or lease documents.

Also please provide a list of all expenses you have incurred over the financial year, including fuel, repairs and maintenance, registration and insurance etc.

2. **Work Uniform:** Do you wear a corporate uniform or protective clothing. If yes, did you purchase any new items? (If so please provide details. Include Safety Boots, sunglasses, sunscreen, hats etc.)

3. **Work from Home: *New Rules for 2023***

***Revised fixed rate method:***

Estimated hours - 1<sup>st</sup> July 2022 to 28<sup>th</sup> February 2023: \_\_\_\_\_

How is this estimate arrived at eg diary records, time sheets, educated guess?

Actual hours – 1<sup>st</sup> March 2023 to 30<sup>th</sup> June 2023: \_\_\_\_\_

***Actual method:***

Requires calculation of data, internet, mobile phone usage, electricity and gas based on usage per item of equipment for the exact number of hours per day. Refer to [ATO Working from Home Deductions Fact Sheet](#)

4. **Other Deductions: (attach list if necessary)**

The ATO is watching and checking these claims closely. ATO audit activity is significant. Make sure you have receipts/paperwork to support all deductions.

- Union Fees/Professional bodies \_\_\_\_\_
- Income, Sickness & Accident Insurance \_\_\_\_\_
- Donations/School building fund \_\_\_\_\_
- Computer purchase costs \_\_\_\_\_
- Seminar costs/Self Education \_\_\_\_\_

**Note:** If you are paying off your Self Education fees through HELP or a Student Financial Supplement Loan or PELS, please provide us with your statements to include in your return.

4. **Personal Superannuation Contribution Deduction**

Please provide copies of correspondence from your superannuation fund confirming your entitlement to a deduction, if you wish to claim a deduction for a personal super contribution.

**REBATES:**

1. **Private Health Insurance:** Do you have Private Health Insurance?

Yes

No

If yes, please provide us with a copy of the health fund statement sent you to after the end of the financial year. This will tell us if you are entitled to a rebate.

2. **Spouse** Did you have a spouse for the full financial year?

Yes

No

If you had a spouse for only part of the income year, please specify the dates between 1 July 2022 and 30 June 2023 when you had a spouse.

From    /    /            to    /    /

\*\* If we are **not** preparing your spouse's tax return, please provide the following where applicable:

- Spouse taxable income: \_\_\_\_\_
- Salary sacrifice amount  
(Reportable Fringe Benefits on Payment Summary) \_\_\_\_\_
- Fringe Benefit amounts, \_\_\_\_\_
- Exempt Pension income \_\_\_\_\_
- Investment loss (ie rental property loss) \_\_\_\_\_
- Child support paid \_\_\_\_\_

I confirm the information provided above is correct:

\_\_\_\_\_  
Signed:

Date: