

Individual Income Tax Checklist

For your convenience a list of information required to complete your individual income tax return is provided below. If required print the checklist and send it in with the supporting documents and other information.

Where this is the first time we are completing your income tax return, please provide a copy of your last lodged income tax return.

Personal details

If any of the details below have changed since your last income tax return, please ensure you have included the update below.

Full name	
Date of birth:	
Tax File Number:	
Residential address:	
Email:	
Phone number:	

Marital status:	
Spouse's full name:	
Spouse's date of birth:	
If married throughout the year, date of marriage:	

Details of dependents (if applicable)

Dependent 1 full name:	
Dependent 1 date of birth:	
Dependent 2 full name:	
Dependent 2 date of birth:	
Dependent 3 full name:	
Dependent 3 date of birth:	

If any of the following apply to you, please provide all applicable information. Tick if applicable.

Income

PAYG Payment Summary (group certificate) from each place of employment of the year.

Eligible Termination Payment (ETPs) Summaries

Any bonuses, director's fees, commissions, tips, living away from home allowances, Centrelink or government payments

Details of any pension and/or annuity payments received throughout the year

Details of any Australian Superannuation lump sum payments received throughout the year

Details of interest payments received throughout the year, including breakdown of bank name, account/term deposit number and interest amount

Details of any dividends received throughout the year, including copies of dividend statements

Details of any amounts received from partnerships and trusts throughout the year (including public or private trusts/partnerships/managed funds). If a public trust/managed fund, please provide a copy of the tax annual statement for the year. For all other trusts and partnerships please provide documents stating income you have received.

Do/did you run your own business? If yes, provide information and documentation on all income and expenses from this business. If accounting or bookkeeping software is used, please provide a copy of the file or access to the file.

Does your business income come predominately (80% or more) from the one source?

Provide details of any net farm management deposits or withdrawals for the year

Details of any foreign source income received throughout the year and any foreign assets or property held, including country of origin, source of income, amount of any tax withheld, amount and details of any deductions/expenses incurred in relation to the foreign income

Details of any rental income received throughout the year, including the following:

- Number of weeks property was available for rent throughout the year. If un-rented for a period, the reason why.
- Annual rental statement from real estate agent
- Details of any additional income or expenditure not recorded on the real estate agent statement, including but not limited to:
- Interest charged on loans used to purchase the rental property, including bank, loan number and interest amount
- Capital expenditure (e.g. large repairs or renovations). If so, please provide copy of all invoices in relation to this and details of what and why the work was carried out

Were you part of any Forestry managed investment scheme? If yes, provide details of any income received or expenditure incurred during the year and the schemes name and reference.

Any other sources of income you have received during the year that has not been provided for above.

Deductions

Details of work-related motor vehicle expenses including either;

- The work-related kilometres travelled throughout the year (this does not include kilometres travelled between home and your usual place of work), OR
- Details of log book expenses as follows:
- Make and model of the motor vehicle
- Purchase date and cost of the motor vehicle
- Work related % usage of car (this should come from a valid log book kept within the last 5 financial years)
- Fuel/oil expenses incurred during the year
- Financing costs of the car (interest only portion of loan or chattel mortgage payments)
- Registration fees
- Repairs, maintenance and servicing costs
- Insurance premiums
- Any other expenses incurred for the motor vehicle during the year

Details of any work-related travel undertaken during the year, including:

- Place of travel, dates and details of any non-work private portion of the travel
- If your travel away from home included six or more nights in row, please provide a copy of the travel diary showing dates, places, times and duration of activities and travel.
- Details of expenses incurred and not reimbursed directly (separate to an allowance by your employer), including airfares, accommodation, meals, incidentals, conference fees etc
- Confirm if a travel allowance was received and if this has been disclosed on your PAYG Payment Summary

If a uniform or logo branded item of clothing was purchased throughout the year, please provide details.

If protective or occupation specific clothing was purchased during the year, please provide a breakdown of what was purchased, when and the cost.

Please provide details of any education expenses incurred during the year for a course or activity undertaken which has a connection to your current work activities and is either to maintain or improve the skills and knowledge you require for work, or, is likely to result in an increase in your income from your current work activities.

Details of any other work-related expenditure incurred and their work-related percentage, for example (but not limited to):

- Union fees
- Subscriptions
- Memberships
- Seminars
- Home office expenses (please provide details)
- Assets purchased for use for work

Details of any interest or expense incurred in relation to interest or dividend income, including for example any interest on a loan which was used to purchase shares.

Details of any donations throughout the year? Please provide a breakdown by charity and amount. Please advise if anything was received as a result of the donation (e.g. toy, raffle tickets, seat at a gala dinner etc)

Details of any expenses for managing tax affairs provided by someone other than our office

Did you make any personal contributions to your superannuation? If yes, please provide a copy of the confirmation document from your superannuation confirming the amount deductible

Other items

Did you purchase any assets throughout the year, including property, shares, trust units etc? If so, please provide copies of all purchase documents, including (where applicable);

- Purchase contract (including the date of exchange of contracts)
- Settlement statement
- Holding statements
- Legal fee invoices

Did you sell any assets previously held? If so, please provide copies of all sale documents, including (where applicable);

- Sale contract (including the date of exchange of contracts)
- Settlement statement
- Holding statements
- Legal fee invoices
- Commission paid invoice
- For shares, details of any bonus/right issues, capital returns etc received during your ownership of the shares

If you belonged to a health fund throughout the year, please provide a copy of the annual statement issued by the fund