

Individual Tax Return Information Checklist



Name: _____
 Date of Birth: _____
 Tax File Number: _____
 Address: _____
 Bank Account details: _____

Section	Description	Yes	No	Documents to be uploaded/provided
Employment	Do you have any income from Salary or Wages?	<input type="checkbox"/>	<input type="checkbox"/>	Copy of PAYG Payment Summary provided by your employer(s).
	Are you required to use your car for work related purposes?	<input type="checkbox"/>	<input type="checkbox"/>	Estimate (average) of kilometres travelled for work related purposes per week/month/year OR details for all car expenses incurred for the year along with your log book records.
	Did you incur any travel expenses relating to your work not reimbursed by your employer?	<input type="checkbox"/>	<input type="checkbox"/>	Listing of expenses incurred AND/OR related receipts.
	Are you required to wear a uniform, protective or special clothing in your work duties?	<input type="checkbox"/>	<input type="checkbox"/>	Listing of costs incurred for uniform purchases and laundry/cleaning AND/OR related receipts.
	Have you incurred costs for education courses relating to your employment activities?	<input type="checkbox"/>	<input type="checkbox"/>	Listing of costs incurred for course fees and related resources AND/OR related receipts.
	Are you required to work from home as a part of your work duties?	<input type="checkbox"/>	<input type="checkbox"/>	Estimate (average) of the number of hours worked at home per week/month/year. Cost of internet charges along with an estimate of your work related percentage. Listing of any expenses relating to home office purchases (eg. Furniture, computers, stationery etc) AND/OR related receipts.
	Have you purchased any equipment required for you work duties?	<input type="checkbox"/>	<input type="checkbox"/>	Listing of purchases (eg. Tools, computers, smartphones) including date, amount and estimate of your work related percentage AND/OR related receipts.
	Have you incurred any other expenses relating to your work duties - these may include:	<input type="checkbox"/>	<input type="checkbox"/>	Listing of any expenses AND/OR related receipts.
	> Union fees	<input type="checkbox"/>	<input type="checkbox"/>	
	> Professional Registrations/Subscriptions	<input type="checkbox"/>	<input type="checkbox"/>	
> Conference fees	<input type="checkbox"/>	<input type="checkbox"/>		
> Reference materials	<input type="checkbox"/>	<input type="checkbox"/>		
> Telephone use	<input type="checkbox"/>	<input type="checkbox"/>		
> Sun protection products for outdoor work duties	<input type="checkbox"/>	<input type="checkbox"/>		
Other	Have you made any donations to charities?	<input type="checkbox"/>	<input type="checkbox"/>	Listing of all donations AND/OR related receipts.
	Do you have Private Health Insurance?	<input type="checkbox"/>	<input type="checkbox"/>	Statement from your insurer confirming your cover and premiums paid for the year.
	Do you have any Business Income to declare?	<input type="checkbox"/>	<input type="checkbox"/>	Listing of Business income and expenses AND/OR related receipts/invoices. <i>You may also download our separate Business Worksheet to assist with this process.</i>
	Have you paid any Income Protection or Sickness and Accident Insurance premiums?	<input type="checkbox"/>	<input type="checkbox"/>	Letter from your insurer confirming tax deductible premiums for the year.
Investments	Do you have any Interest income?	<input type="checkbox"/>	<input type="checkbox"/>	Listing of interest earned on all bank accounts and/or copies of related bank statements.
	Do you have any Dividend income?	<input type="checkbox"/>	<input type="checkbox"/>	Listing of dividends paid during the year and/or copies of related dividend statements.
	Do you have any income from Managed Fund or Listed Trust investments?	<input type="checkbox"/>	<input type="checkbox"/>	Annual Taxation Statement.
	Do you have any income from Rental properties?	<input type="checkbox"/>	<input type="checkbox"/>	Listing of rental property income and expenses AND/OR related receipts/invoices. <i>You may also download our separate Rental Property Worksheet to assist with this process.</i>
	Have you paid any investment related expenses?	<input type="checkbox"/>	<input type="checkbox"/>	Listing of any expenses (eg. loan interest, reference materials, investor subscriptions) AND/OR related receipts/invoices.
	Have you purchased or sold any investments during the year?	<input type="checkbox"/>	<input type="checkbox"/>	Original purchase details including date and amount(s) paid AND/OR original purchase documentation. Details of sale including date sold and amount(s) received AND/OR related sale documentation.