

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 No/Yes....
 Newstart, Sickness or other Allowances No/Yes....
 Aust. Government Pensions or other Allowances No/Yes....
 Salary & Wages No/Yes....
 Lump Sum Payments (including Superannuation) No/Yes....
 Eligible Termination Payments No/Yes....
 Other Australian Pensions or Annuities No/Yes....
 Veterans Affairs Pension No/Yes....
 Any other income including – No/Yes....
 * Allowances – shown on Group Certificates No/Yes....
 * Other Allowances – benefits, earnings, tips directors fees etc. No/Yes....
 * Kilometre reimbursement for Car Expenses No/Yes....
 Interest No/Yes....
 Income from Partnerships and/or Trusts No/Yes....
 Net Income or Loss from Business No/Yes....
 Net Capital Gains No/Yes....
 Foreign Income & Foreign Assets or Property No/Yes....
 Rent No/Yes....
 Dividends No/Yes....
 Imputation Credits No/Yes....
 Bonuses - Life Assurance or Friendly Society Policy No/Yes....
 Other Income (please specify) No/Yes....

Self Education Expenses

Course taken at Educational Institution No/Yes....
 - Course Fees No/Yes....
 - Travel No/Yes....
 - Other No/Yes....
 Seminars and Courses not at an Educational Institution No/Yes....
 - Course Fees No/Yes....
 - Travel No/Yes....
 - Other No/Yes....

Other Expenses

Sunscreen, sunglasses etc. No/Yes....
 Home Office Expenses No/Yes....
 Computer & Software No/Yes....
 Telephone/Mobile Phone/Internet No/Yes....
 Tools & Equipment No/Yes....
 Subscriptions & Union Fees No/Yes....
 Journals/Periodicals No/Yes....
 Depreciation No/Yes....
 Expenses in relation to Allowances No/Yes....
 Any other Work Deductions No/Yes....
 Union Fees No/Yes....

DEDUCTIONS

Work Related Car Expense Claims

Rate per km method No/Yes....
 Log Book method (A detailed log book kept) No/Yes....

Other Work Related Travel Expenses

Employee domestic travel with reasonable allowances No/Yes....
 Employee claiming actual expenses No/Yes....
 Travel for 6 or more nights in a row No/Yes....
 - Do you have a travel diary?
 Overseas travel under reasonable allowances No/Yes....
 - Do you have a diary and accommodation receipts?
 Apportioning private/business travel No/Yes....
 - deductible percentage

Uniform/Protective Clothing Expenses

Protective Clothing – Replacement No/Yes....
 Occupation Specific Clothing – Replacement No/Yes....
 Non-compulsory Uniform – Replacement No/Yes....
 Compulsory Uniform – Replacement No/Yes....
 Laundry (Standard Calc. \$1 or 50c per load up to \$150) No/Yes....
 Dry Cleaning No/Yes....
 Other Claims (mending/polishing etc.) No/Yes....

OTHER DEDUCTIONS

Gifts of \$2 or more to eligible Charities No/Yes....
 Tax Agent Fees for previous year No/Yes....
 Undeducted Purchase Price of Annuity No/Yes....

REBATES/OFFSETS

Zone Rebate (Resident in Zone Only) No/Yes....
 Medical Expense Rebate No/Yes....
 Dependent (Invalid and Carer) Tax Offset No/Yes....
 Senior & Pensioners Tax Offset No/Yes....
 Low Income Rebate No/Yes....
 Private Health Insurance Rebate No/Yes....
 Other Rebates No/Yes....
 Rebate for Spouse Superannuation No/Yes....

OTHER INFORMATION

If you had a partner during the tax year please provide us with their full names, taxable income and date of birth.