

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: _____
Occupation: _____ Bank Details BSB: _____ Acc No: _____

INCOME

- PAYG Income ☐ N ☐ Y ☐ □
- Newstart, Sickness or other Allowances ☐ N ☐ Y ☐ □
- Aust. Government Pensions or other Allowances ☐ N ☐ Y ☐ □
- Salary & Wages ☐ N ☐ Y ☐ □
- Lump Sum Payments (including Superannuation) ☐ N ☐ Y ☐ □
- Eligible Termination Payments ☐ N ☐ Y ☐ □
- Other Australian Pensions or Annuities ☐ N ☐ Y ☐ □
- Veterans Affairs Pension ☐ N ☐ Y ☐ □
- Any other income including ☐ N ☐ Y ☐ □
 - Allowances – shown on Group Certificates ☐ N ☐ Y ☐ □
 - Other Allowances – benefits, earnings, tips directors fees etc. ☐ N ☐ Y ☐ □
 - Kilometre reimbursement for Car Expenses ☐ N ☐ Y ☐ □
- Interest ☐ N ☐ Y ☐ □
- Income from Partnerships and/or Trusts ☐ N ☐ Y ☐ □
- Net Income or Loss from Business ☐ N ☐ Y ☐ □
- Net Capital Gains ☐ N ☐ Y ☐ □
- Foreign Income & Foreign Assets or Property ☐ N ☐ Y ☐ □
- Rent ☐ N ☐ Y ☐ □
- Dividends ☐ N ☐ Y ☐ □
- Imputation Credits ☐ N ☐ Y ☐ □
- Bonuses - Life Assurance or Friendly Society Policy ☐ N ☐ Y ☐ □
- Working Holiday Makers Income ☐ N ☐ Y ☐ □
- Other Income (please specify) ☐ N ☐ Y ☐ □

DEDUCTIONS

Work Related Car Expense Claims

- Rate per km method ☐ N ☐ Y ☐ □
- Log Book method (A detailed log book kept) ☐ N ☐ Y ☐ □

Other Work Related Travel Expenses

- Employee domestic travel with reasonable allowances ☐ N ☐ Y ☐ □
- Employee claiming actual expenses ☐ N ☐ Y ☐ □
- Travel for 6 or more nights in a row ☐ N ☐ Y ☐ □
 - Do you have a travel diary? ☐ N ☐ Y ☐ □
- Overseas travel under reasonable allowances ☐ N ☐ Y ☐ □
 - Do you have a diary and accommodation receipts? ☐ N ☐ Y ☐ □
- Apportioning private/business travel ☐ N ☐ Y ☐ □
 - deductible percentage ☐ N ☐ Y ☐ □

Uniform/Protective Clothing Expenses

- Protective Clothing – Replacement ☐ N ☐ Y ☐ □
- Occupation Specific Clothing – Replacement ☐ N ☐ Y ☐ □
- Non-compulsory Uniform – Replacement ☐ N ☐ Y ☐ □
- Compulsory Uniform – Replacement ☐ N ☐ Y ☐ □
- Laundry (Standard Calc. \$1 or 50c per load up to \$150) ☐ N ☐ Y ☐ □
- Dry Cleaning ☐ N ☐ Y ☐ □
- Other Claims (mending/polishing etc.) ☐ N ☐ Y ☐ □

Self Education Expenses

- Course taken at Educational Institution ☐ N ☐ Y ☐ □
 - Course Fees ☐ N ☐ Y ☐ □
 - Travel ☐ N ☐ Y ☐ □
 - Other ☐ N ☐ Y ☐ □
- Seminars and Courses not at an Educational Institution ☐ N ☐ Y ☐ □
 - Course Fees ☐ N ☐ Y ☐ □
 - Travel ☐ N ☐ Y ☐ □
 - Other ☐ N ☐ Y ☐ □

Other Expenses

- Sunscreen, sunglasses etc. ☐ N ☐ Y ☐ □
- Home Office Expenses ☐ N ☐ Y ☐ □
- Computer & Software ☐ N ☐ Y ☐ □
- Telephone/Mobile Phone/Internet ☐ N ☐ Y ☐ □
- Tools & Equipment ☐ N ☐ Y ☐ □
- Subscriptions & Union Fees ☐ N ☐ Y ☐ □
- Journals/Periodicals ☐ N ☐ Y ☐ □
- Depreciation ☐ N ☐ Y ☐ □
- Expenses in relation to Allowances ☐ N ☐ Y ☐ □
- Any other Work Deductions ☐ N ☐ Y ☐ □
- Union Fees ☐ N ☐ Y ☐ □

OTHER DEDUCTIONS

- Gifts of \$2 or more to eligible Charities ☐ N ☐ Y ☐ □
- Tax Agent Fees for previous year ☐ N ☐ Y ☐ □
- Undeducted Purchase Price of Annuity ☐ N ☐ Y ☐ □
- Personal Super Contributions ☐ N ☐ Y ☐ □

REBATES/OFFSETS

- Zone Rebate (Resident in Zone Only) ☐ N ☐ Y ☐ □
- Dependent (Invalid and Carer) Tax Offset ☐ N ☐ Y ☐ □
- Senior & Pensioners Tax Offset ☐ N ☐ Y ☐ □
- Low Income Rebate ☐ N ☐ Y ☐ □
- Private Health Insurance Rebate ☐ N ☐ Y ☐ □
- Other Rebates ☐ N ☐ Y ☐ □
- Rebate for Spouse Superannuation ☐ N ☐ Y ☐ □

OTHER INFORMATION

Spouse/Partner:

Full name: _____

DOB: _____

Taxable Income: _____

Please ensure you have all relevant substantiation to support your claim.

