



**CHARTERED
ACCOUNTANTS**

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2023 Individual Income Tax Return Checklist

This checklist is designed as a guide for the preparation of your personal income tax return. Completing this checklist will ensure we have all the relevant information required to prepare your personal income tax return quickly and efficiently.

Some items listed may not apply to your situation or you may want to contact us to clarify.

Name			
Address			
Postal (if different)			
Contact Numbers	Mobile	Home	
	Work	Fax	

Email Address	
Do you want correspondence by email or mail (please circle)	Email / Mail

Occupation	
The following 2 items are only required if this is the first year we are preparing your return	
Date of Birth	Tax File Number

Spouse (if we don't prepare their tax return)	Name	
	Date of Birth	
	Taxable Income	

Names of any dependent children	Date of Birth	Name

Bank Account	From 1 July 2013, individual tax refunds are required to be paid directly into your bank account		
Account Name			
BSB		Account	

INCOME

Have you received any of the following payments?		Amount / details
Salary or wages	YES/NO	If yes, we have access to this online
Allowances, earnings, tips, director's fees etc	YES/NO	
Employer lump sum payments	YES/NO	
Employment termination payments	YES/NO	
Australian Government allowances and payments like newstart, and austudy	YES/NO	
Australian Government pensions and allowances	YES/NO	
Australian annuities and superannuation income streams and pensions	YES/NO	
Interest	YES/NO	
Dividends	YES/NO	
Employee share schemes	YES/NO	
Distributions from partnerships and/or trusts	YES/NO	
Net income or loss from business	YES/NO	
Capital gains, ie sale of shares	YES/NO	
Foreign source income	YES/NO	
Rent (please complete rental checklist)	YES/NO	
Any other income not listed above (please specify)	YES/NO	
Comments or Questions:		

DEDUCTIONS

Have you incurred any of the following for work? (remember you will need to keep records to substantiate)		Amount / details
Work related car expenses (one of the following):	YES/NO	
cents per kilometre method (up to a maximum of 5,000 kms)		
If you travel more than 5,000km for work then you must use the log book method		To claim please complete the motor vehicle checklist
Work related travel expenses, ie taxi's	YES/NO	
Work related uniform and protective clothing expenses	YES/NO	
Work related self-education expenses	YES/NO	
Other work related expenses:		
Telephone/mobile phone	YES/NO	
Tools and equipment	YES/NO	
Subscriptions and union fees	YES/NO	
Computer and software	YES/NO	
Journals/periodicals	YES/NO	
Sun protection products (i.e., sunscreen and sunglasses)	YES/NO	
Seminars and courses	YES/NO	
Home office expenses, estimated number of hours working from home.	YES/NO	
Other types of deductions:		
Interest deductions	YES/NO	
Dividend deductions	YES/NO	
Gifts or donations	YES/NO	
Cost of managing tax affairs	YES/NO	
Income Protection Insurance	YES/NO	
Personal Superannuation Contributions (Note the notice of intent to claim as a deduction must be received prior to lodging your return or the ATO will disallow the deduction)	YES/NO	
Comments or Questions:		

OTHER

		Amount / details
Have you lived in a remote or isolated area of Australia? (Where and how long)	YES/NO	
Do you have a dependent parent?	YES/NO	
Did you or your spouse receive FTB through the Family Assistance Office ?	YES/NO	
Did you have private health insurance 'Hospital Cover'?	YES/NO	If yes, we have access to this online
Did you make superannuation contributions on behalf of your spouse?	YES/NO	
Do you have a HELP liability or a student financial supplement loan debt?	YES/NO	
Medical Expenses, please note for the 2020 and future years you are no longer able to claim the medical expenses rebate.		
Comments or Questions:		

I declare that:

1. I have instructed you to prepare my income taxation return for the year ended 30 June 2023.
2. I have disclosed, and you have returned, all of the income including net capital gains, crypto buy and sells which I have earned/received, for the 2023 income year.
3. All income declared, claims for deductions and tax offsets/rebates included in my return are based on my specific instructions and advice that I satisfy the relevant taxation requirements.
4. I have all receipts or documentation necessary to substantiate the above claims and I will make them available if required by the Tax Office.

Signature

Date/...../.....