



## 2021 INDIVIDUAL TAX RETURN CHECKLIST

PLEASE ANSWER THE FOLLOWING QUESTIONS AND WHERE REPLY IS YES, PLEASE SUPPLY SUPPORTING INFORMATION. WE REQUIRE SCANNED COPIES OF YOUR ORIGINAL TAX DOCUMENTS SENT TO US VIA EMAIL.

### A. INCOME (Please provide the amounts & supporting documents)

#### 1. Did you receive income from:

- (a) Salary/wages and other allowances (e.g. parental Leave Pay, bonuses and tips)
- (b) Any Superannuation pension, annuity or Government benefits/allowances
- (c) Youth allowance, Austrudy or ABSTUDY
- (d) Newstart allowance or Youth allowance
- (e) Interest and withholding taxes
- (f) Dividends (including re-invested dividends)
- (g) Trust Distributions or Managed Funds (e.g. unit, cash management, deceased estate, partnership etc.)

#### 2. Did you receive any lump sum payments (e.g. an ETP) from the termination of your employment?

#### 3. For Capital Gains Tax purposes, did you sell, dispose of, or sign any contracts during the year for sale of any assets (e.g. shares, land, house, etc) in Australia and/or overseas?

#### 4. Did you receive any overseas income (e.g. foreign employment, Pensions, annuities, interest, rent, dividends, etc)?

#### 5. Did you receive any other form of income (e.g. royalties, consulting fees, employee shares schemes)?

#### 6. Did you receive any income or incur any expenses from your own a business?

#### 7. Did you receive Forestry Managed Investment scheme income?

### B. DEDUCTIONS

#### 1. Did you incur any work related expenses which you have supporting documents?

- \*(a) Work related vehicle expenses (Note: Log books must be under 5 years old)?
- \*(b) Work related travel expenses

If you answer "yes" for above two questions, please summarize vehicle expenses, car purchase details and log book business % applicable and note total business kilometers travelled.



- (c) Work related uniform expenses, laundry and dry cleaning?
- (d) Self education expenses relating to your work? **Please provide payment details and invoice**
- (e) Any other work related expenses: **Please provide invoice and business percentage**
  - (i) Income protection insurance, if applied
  - (ii) Home office, telephone, electricity, internet, furniture **(Due to covid-19, please provide hours you work from home during the year)**
  - (iii) Subscriptions, magazines, association or union fees
- (f) Tax Management expenses for tax return preparation or advice

**2. Do you own a Rental Property? If YES, please provide details of the following items:**

- (a) Rent received
- (b) Agents fees/Commission
- (c) Council and water rates
- (d) Capital Improvements
- (e) Repairs & maintenance (dates and details required)
- (f) Strata levies (an Special Levies)
- (g) Interest on Loan
- (h) Building Depreciation Reports
- (i) National Rental Affordable scheme certificate, if available

***If newly acquired or sold, provide settlement details, plus exchange dates of purchase and sale. Confirm how many weeks in the year that the property was available for rent.***

**3. Have you made any donations to eligible organizations or charities?**

**4. Interest and dividend deductions**

**5. Do you have any other expenses that might be deductible (e.g. Agriculture/Horticulture Investments)?**

**C. REBATES & OFFSETS**

**1. Spouses and dependants**

- (a) Do you support a dependent spouse/de facto born after 1 July 1952?
- (b) Was he or she not eligible for Family tax Benefit part B? Did your taxable income exceeds \$150,000? If you answer YES for question (b), Please provide your spouse details:
  - (i) Number of days living together
  - (ii) Full Name and Date of Birth
  - (iii) Tax File Number



(iv) Separate net income

(c) Do you also support a dependent child under 16?

(d) Were you a sole parent? When the period of the year is for?

(e) Other rebates e.g. zone, invalid relatives, spouse superannuation contribution?

**2. Did you or your dependents have appropriate Private Health Insurance Cover?**

(Please provide Private Hospital Insurance Statement)

**3. Are you entitled to claim a Medicare exemption (e.g. Defence Forces)?**

**4. Did your residency for income tax purposes change during the year?**

**5. Do you have a HECS or HELP debt?**

**TAXPAYER'S DECLARATION**

I declare that all the information I have given is true and correct and that I have the necessary receipts and records to support each of the above amounts claimed.

TAXPAYER'S SIGNATURE:

DATE: