

TAX RETURN CHECKLIST

Please ensure you fully complete ALL relevant questions and provide additional information as necessary on separate sheets and securely attach all documents to this form.

PERSONAL DETAILS

Your full name

Title Mr Mrs Miss Ms Dr

Date of birth Tax File Number (TFN)

Address

Email

Occupation

Phone Mobile Home Work

Spouse name DOB Income
Please provide a copy of your spouse's income tax return if not prepared by our office

Children

Name	<input type="text"/>	DOB	<input type="text"/>	Income	<input type="text"/>
Name	<input type="text"/>	DOB	<input type="text"/>	Income	<input type="text"/>
Name	<input type="text"/>	DOB	<input type="text"/>	Income	<input type="text"/>

INCOME

Tick if applicable and provide paperwork

- Salary or wages (this includes paid parental leave payments)
- Bank interest
- Allowances, earnings, tips, Director's fees etc
- Employer lump sum payment
- Employment termination payments
- Australian Government allowances and payments like Newstart, Youth Allowance and Austudy payments
- Australian Government pensions and allowances
- Australian annuities and superannuation income streams
- Australian Superannuation lump sum payments
- Dividends paid (please provide paperwork if shares for all dividends paid including shares owned in Employee Share Plan)

TAX RETURN CHECKLIST

- Distributions from partnerships and/or trusts
- Rental properties (see separate checklist)
- Business income
- Foreign source income (including foreign pensions) and foreign assets or property
- Sale of assets with potential capital gains tax implications
- Proceeds from cashed in/matured Life Policies, Insurance or Friendly Society Bonds
- Forestry management investment scheme income
- Other income (please specify)

WORK RELATED DEDUCTIONS

Once your total work related deductions exceed \$300, you must be able to substantiate your total claim with receipts. Please list the private use percentage where applicable.

1. Car expenses
 - Kilometres travelled Engine size up to 1600cc 1601-2600cc over 2600cc
2. Domestic/Overseas Travel (attach details) Yes No
3. Work related clothing
 - Purchase of compulsory uniforms
 - Purchase of protective clothing
 - Dry cleaning of uniforms
 - Does your employer provide uniforms? Yes No
 - Do you have to launder uniforms? Yes No
4. Self education expenses (attach details) Yes No
5. Conferences and seminars (attach details) Yes No
6. Other
 - Union/Professional membership fees
 - Books/Reference material
 - Sun protection (if working outdoors)
 - Telephone and internet
 - Home office (hours of use per week)

TAX RETURN CHECKLIST

Tolls	\$	<input type="text"/>
Parking	\$	<input type="text"/>
Tools/Equipment <\$300	\$	<input type="text"/>
Tools/Equipment >\$301	\$	<input type="text"/>
Description	<input type="text"/>	
Date purchased	<input type="text"/>	
Amount	\$	<input type="text"/>
Other (give details)	<input type="text"/>	

OTHER DEDUCTIONS

1. School Building Fund donations	\$	<input type="text"/>
2. Donations to Charity (NOT Art Union)	\$	<input type="text"/>
3. Tax Agent's fee	\$	<input type="text"/>
4. Travel to Tax Agent last year		
Kilometres travelled	<input type="text"/>	Engine size <input type="checkbox"/> up to 1600cc <input type="checkbox"/> 1601-2600cc <input type="checkbox"/> over 2600cc
5. Income Protection insurance	\$	<input type="text"/>
6. Self education expenses relating to receipt of your allowance (attach details)	<input type="checkbox"/> Yes	<input type="checkbox"/> No
7. Expenses in relation to any allowances received (attach details)	<input type="checkbox"/> Yes	<input type="checkbox"/> No
8. Business expenses (attach details)	<input type="checkbox"/> Yes	<input type="checkbox"/> No
9. Interest paid on funds borrowed for investments (attach details)	<input type="checkbox"/> Yes	<input type="checkbox"/> No
10. Asset disposals (attach full details)	<input type="checkbox"/> Yes	<input type="checkbox"/> No
11. Superannuation paid by self-employed (include fund name, ABN number and your Policy Number)	<input type="checkbox"/> Yes	<input type="checkbox"/> No
12. Forestry managed investment scheme deduction (attach details)	<input type="checkbox"/> Yes	<input type="checkbox"/> No
13. Any other expenditure relating to your work that you wish to speak to us about?	<input type="checkbox"/> Yes	<input type="checkbox"/> No

TAX RETURN CHECKLIST

REBATES

Medical Medical Expenses – Did your family have NET (after Health fund and Medicare reimbursements) medical expenses over \$2,060? (If yes, provide details)

Zone Place/town No. of days resident

Spouse Superannuation contributions \$

EDUCATION EXPENSES

The Australian Government announced in the 2012 Budget that the Education Tax Refund (ETR) would be replaced by a new payment called the School Kids Bonus. This means that you are no longer able to claim the ETR.

The ETR for 2011/2012 will be paid out in full to all eligible families as a one-off payment starting from 20 June 2012. If you did not receive a one-off payment you can contact the Department of Human Services Family Assistance Office on 13 61 50.

OTHER INFORMATION

MEDICARE LEVY - Did you and all your dependents have private hospital cover for the entire year? (If yes, include the annual tax advice from your fund) Yes No

SUPER CO-CONTRIBUTION - Did you make an after-tax personal contribution to super during the financial year? Yes No

CHILD SUPPORT - Did you or your spouse pay child support in the financial year? Yes No
If yes, how much was paid? \$

HECS DEBT Yes No

You can arrange to have your refund credited direct to your bank account, please provide your account details.

Same bank account as last year? Yes No (If no please specify below)

Account name

BSB Account number

I confirm that the above information is correct and that where necessary I hold documentary evidence in support of my claims.

Client signature Date

Client name (printed)