



Individual Tax Return Checklist

Please ensure that you complete ALL questions and provide additional information as necessary on separate pages and securely attach all documentation to this form when submitting to our office for preparation of your taxation return.

FAMILY TAX BENEFITS Family tax benefits are no longer claimed through the tax system. Please contact the Family Assistance Office directly.

EDUCATION TAX REFUND Education Tax Refund is no longer claimed through the tax system. You will need to contact the Family Assistance Office regarding this also.

Please circle **YES** or **NO** for each item listed below and provide relevant details where required.

Spouse Details – married or de facto (including same sex)

Did you have a spouse for the full tax year from 1 July to 30 June? YES / NO

If you had a spouse for only part of the income year, please specify the dates between 1 July to 30 June when you had a spouse:

From ___/___/___ to ___/___/___

What is your spouse's name and date of birth? (If you had more than one spouse during the tax year, please provide the name of your spouse on 30 June, or your last spouse)

Name:

DOB: ___/___/___

Did your spouse (named above) have taxable income during the tax year? YES / NO

If yes, what was the amount? \$.....

Dependant Children

Do you have any Dependant Children YES / NO

Please provide details of all dependant children (given name and date of birth)

_____ / ___/___

_____ / ___/___

_____ / ___/___

INCOME

Payment Summaries and Termination Payments (please attach)	YES / NO
Reportable Fringe Benefits (FBT)	YES / NO
Reportable Employer Superannuation Contribution (RESC)	YES / NO
Unemployment/Sickness Benefits/Austudy etc (please attach)	YES / NO
Centrelink Pensions (please attach)	YES / NO
Interest received on bank accounts (total)	\$.....
Distributions from Trusts & Managed Investments (please attach yearly taxation statement)	YES / NO
Dividends (attach payment slips for tax credits or complete separate checklist)	YES / NO
Rental Property (if yes, refer to separate checklist)	YES / NO
Business Income (if yes, attach separate details)	YES / NO
Cashed in or matured Life Policies, Insurance of Friendly Society Bonds (attach documents).	YES / NO
Employee Share Schemes (if yes, attach details)	YES / NO
Details of sale of assets including main residence	YES / NO
.....	
Any other income	YES / NO
.....	

DEDUCTIONS AND REBATES

The following deductions and tax offsets (rebates) are available to obtain the maximum refund for you. As these can be complex, we may need to discuss them with you by telephone before completing your return, if you are mailing this form to us.

Deductions

Work related car expenses - *we do recommend discussing this with your accountant prior to claiming*
 Cents per kilometre method (up to a maximum, of 5,000 kms) YES / NO

If yes, how many kilometres _____ Engine size _____ cc

Log Book Method YES / NO

If yes, please provide detailed break up of amount to be claimed

Work related uniform and other clothing expenses

Protective clothing	\$.....
Occupation specific clothing	\$.....
Laundry expenses (up to \$150 without receipts)	\$.....
Dry cleaning expenses	\$.....
Sun protection products (ie. Sunscreen and sunglasses)	\$.....
Other claims such as mending/repairs, etc (please specify)	\$.....
.....	\$.....

Work related self-education expenses (please circle applicable code for your situation)

K Required for current work **I** For increased income from current work **O** Other direct connection to current work

Course taken at education institution:

Course fees \$.....

Books, stationery \$.....

Depreciation (computer, etc) \$.....

Travel \$.....

Other (please specify) \$.....

Other work related expenses (please provide full details)

Home office expenses (complete separate checklist) YES / NO

Books and Reference materials \$.....

Union Fees \$.....

Telephone/Mobile phone \$.....

Tools of Trade \$.....

Professional Memberships \$.....

Any other work related deductions (ie. New purchases, computers etc) \$.....

Other Deductions

Income Protection Insurance \$.....

School Building Fund \$.....

Donations to Charity (Not art union or raffle tickets) \$.....

Tax Agent's Fees \$.....

Tax Offsets / Rebates – Please provide evidence

Do you have a dependant spouse born on or before 30 June, 1952? YES / NO

Are you a senior Australian or Pensioner? YES / NO

Did you receive an Australian Superannuation Income Stream? YES / NO

Did you make superannuation contributions on behalf of your spouse? YES / NO

Did you live in a remote area of Australia or serve overseas with the Australian Defence Force or the UN Armed Forces in the tax year? YES / NO

If yes; Place Number of Days

Medical Expenses (If high expenses speak to Accountant as limited opportunity to claim now) YES / NO

Did you maintain an invalid or carer dependant, including spouse, parent, parent-in-law, your or your spouse's child, brother or sister aged over 16 years old? YES / NO

Are you a mature age worker born before 1 July, 1957 with net income from working of less than \$63,000? YES / NO

Private Health Insurance

Do you have private health insurance YES / NO

If yes, please attach statement as provided by your health insurer.

Declaration:

I request Total Tax & Accounting Solutions to prepare my taxation return based on the information declared by me and I understand that I will incur a fee for the service. I will also be required to review and sign the prepared taxation return prior to electronic lodgement with the Australian Taxation Office.

I confirm that the details I have provided are true and correct and disclose my full and complete statement of income and deductions for the tax year I have stated on the cover page. I also advise that I hold the necessary source documentation in relation to the information I have completed above should I be randomly selected for an ATO audit at any time in the future.

Client signature: _____ Dated: ____/____/____