

## 2023 Individual income tax return checklist

Name of taxpayer:			
Occupation:			
DOB:			
TFN:			
ABN (if applicable):			
Number of dependent children:			
Address:			
Email address:			
Mobile number:			
Bank details:	Account name:	BSB:	Acc no:
If we do not prepare your spouse's tax return, please provide the following information:			
Spouse's Full Name:		Spouse's DOB:	
Spouse's Taxable Income:			
Period that you had a spouse during the year: ___/___/___ to ___/___/___ Full Year <input type="checkbox"/>			

INCOME	Information Provided	N/A
A copy of your last tax return. <b>NOT REQUIRED IF WE LODGED YOUR RETURN LAST YEAR.</b>		
Income Statement or PAYG Payment Summaries from employment		
Any allowances, benefits and other earnings <b>not</b> on your PAYG Payment Summary		
Employment Termination Payments Payment Summary		
Government pensions, allowances and payments e.g. Age Pension, Youth Allowance, Newstart etc		
An Australian Annuity or Superannuation Pension		
Interest from any source within Australia		
Dividend statements (including any dividend reinvestment plan or share buyback details)		
Employee share scheme statements		
Partnership distribution statement, including copy of partnership's tax return		
Trust distribution statement, including copy of trust's tax return		
Managed fund annual tax statement and capital gains tax statement		
Income from overseas such as pensions, interest, royalties, dividends, rent or any other foreign income		
Have you sold or disposed of any assets in Australia or overseas? Please provide both purchase & sale details		
Have you received rental income or made your property available for rental? Please complete the Rental Schedule on page 5		
Have you purchase any cryptocurrency? Please obtain a CSV file from your trading platform covering all the trading transactions. Please note that the exchange of cryptocurrencies for goods, cash, or other cryptocurrencies will trigger a capital gains/losses on the date of exchange, even if the gain (or loss) is not actually realised in Australian dollars.		
<p>Income from a business?</p> <ul style="list-style-type: none"> <li>- Records from accounting software (e.g. trial balance, profit and loss, and balance sheet)</li> <li>- Details of any assets purchased, including date of purchase and amount</li> <li>- Payments of salaries and superannuation</li> <li>- Insurance premium</li> <li>- Loan statements (if applicable)</li> <li>- Details of any government grants, rebates or payments received</li> <li>- Details of income and expenses</li> </ul>		
Have you received any other income? Please provide details of any other income you have received.		

Deductions	Information Provided	N/A
Travel in relation to your employment <ul style="list-style-type: none"> <li>- parking fees, public transport, air travel, taxi fares and short-term car hire</li> <li>- meal, accommodation and incidental expenses you incur while away overnight for work</li> </ul> <b>Please provide your travel diary if you kept one</b>		
Did you have work-related motor vehicle expenses? How many work-related kms (not including to and from work) do you estimate you did during the 2023 financial year <b><i>If using the logbook method, ensure you have a current logbook on record within the last 5 years, detailing 12 continuous weeks of use.</i></b>		
Uniform or protective clothing required for your job which identify your occupation (e.g. nurse's uniform) or your employer (e.g. shirt with logo) Safety boots, goggles, aprons, dustcoats, overalls, sunscreen and outdoor protection products		
Laundry/maintenance of uniforms and protective clothing		
Self-education (Work related studies) <b>Is there a direct connection to your employment</b>		
Union Fees/ professional memberships		
Purchase, insurance or repairs to work related equipment		
Income Protection Insurance, or sickness and accident premiums		
Telephone (mobile and home) expenses Please advise what % would be work-related		
Internet expenses Please advise what % would be work-related		
Computer and/or software Please advise what % would be work-related		
Work-related books, journal subscriptions and professional libraries		
Work-related seminars, conferences and other training		
Did you work from home during the 2023 financial year? <b>How many hours did you work from home from 1<sup>st</sup> July 2022 to 30<sup>th</sup> June 2023?</b>		
Personal super contributions including the notice of intent to claim from your superannuation fund.		
Expenditure incurred in earning interest, dividend and other investment income (e.g. investment advice fees, interest etc)		
Receipts for donations of \$2 and over to registered charities		
Expenditure incurred in managing tax affairs (e.g. tax agent's fees)		

Tax Offsets/Other	Information Provided	N/A
<p>Is your normal residence located in a remote or isolated area of Australia? (Note this does not apply to fly in fly out arrangements)</p> <p><b>Where did you live?</b> _____</p> <p><b>From</b> ____ / ____ /20 ____ <b>to</b> ____ / ____ /20 ____</p>		
<p>Have you contributed any superannuation on behalf of your spouse?</p>		
<p>Are you exempt from paying the Medicare Levy?</p> <p><b>Please provide your exemption notice.</b></p>		
<p>Were you a member of a private health fund? Did you have hospital cover?</p> <p>If so please provide <b>the annual tax statement. Funds no longer are providing these unless requested.</b></p> <p><b>Name of Health Fund</b></p>		
<p>Do you have a HECS/HELP debt?</p>		
<p>Have you become or ceased to be a resident of Australia during this financial year?</p>		
<p>Have you paid any PAYG instalments throughout the year to the Tax Office?</p> <p><b>Please provide details</b></p>		

PROPERTY DETAILS			
Address of Rental Property:	***If purchased or sold this year, please provide the settlement statements***		
Date Property Purchased: ___/___/___	Date Property First Earned Rental Income:		
Number of Weeks Available For Rent:	<input type="checkbox"/> Full year (52 weeks) <input type="checkbox"/> Part year: _____ weeks (from ___/___/___ to ___/___/___)		
Ownership Details:	<input type="checkbox"/> In Your Name <input type="checkbox"/> In Joint Names (please supply details): _____		
INCOME – 1 July 2022 to 30 June 2023			
Gross Rent:	\$ _____		
Other Rental Income (recovery of outgoings – water rates, etc):	\$ _____		
PROPERTY DETAILS – 1 July 2022 to 30 June 2023			
Advertising for Tenants:	\$ _____	Body Corporate Fees (Strata levy):	\$ _____
Bank fees on loans:	\$ _____	Cleaning:	\$ _____
Council Rates:	\$ _____	Emergency Services Levy:	\$ _____
Gardening / Lawn mowing:	\$ _____	Inspection Fees:	\$ _____
Insurance:	\$ _____	Interest charged on loans:	\$ _____
Land Tax:	\$ _____	Letting Fees:	\$ _____
Pest Control:	\$ _____	Property Management Commissions:	\$ _____
Repairs & Maintenance (please provide copies of receipts):	\$ _____	Stationery, Telephone & Postage:	\$ _____
Other: _____	\$ _____	Water Rates:	\$ _____
Other: _____	\$ _____	Other: _____	\$ _____
Please provide a copy of the rental statements prepared by a letting agent (if you have one)			
DEPRECIABLE ITEMS (NEW ITEMS OVER \$300 EACH) – 1 July 2022 to 30 June 2023			
ITEM	DATE PURCHASED	COST	
		\$ _____	
		\$ _____	
		\$ _____	
		\$ _____	
		\$ _____	
		\$ _____	
		\$ _____	
		\$ _____	
		\$ _____	
		\$ _____	
IMPROVEMENTS / CONSTRUCTION COSTS – 1 July 2022 to 30 June 2023			
Please provide a copy of your tax depreciation schedule prepared by third party (if you have one)			
ITEM	DATE	COST	
		\$ _____	
		\$ _____	
		\$ _____	
		\$ _____	

OTHER THINGS YOU WOULD LIKE TO MENTION TO US