



Personal Tax Checklist

CLIENT DETAILS

Please fill out this form and either include it with your source documents or bring it along to your appointment

PERSONAL DETAILS

Have any of the following details changed since last year?

Name:

Residential Address:

Postal Address:

Phone Number:

Email Address:

Marital Status: Occupation:

Dependants:

Bank Details: BSB:..... Account No:.....

Account name:

SPOUSE DETAILS (IF APPLICABLE)

Name:

TFN: DOB:

Taxable income

Would you like us to take our fee out of your refund for no extra charge? YES NO

PERSONAL TAX CHECKLIST

INCOME

- PAYG Payment Summaries (Group Certificates)
- Government Allowance Statement or Payment Summary
- Employment Termination Payment Summary
- Non-Government Allowance Statement or Payment Summary
- Superannuation Pension
- Bank statements showing annual interest earned
- Foreign income
- Rental income. Please refer to our Rental Property Checklist for more information.
- Details of other income received

INVESTMENTS

- Dividend Statements (Generally two statements per financial year)
- Managed Fund Annual Tax Statement
- Partnership or Trust Annual Distribution Statement
- Details of interest and other charges paid on loans in relation to interest and dividend-bearing investments

If you have sold shares or other investments during the year, please refer to our Capital Gains Tax Checklist which outlines the information you will need to provide.

DEDUCTIONS

MOTOR VEHICLE EXPENSES

Log book (no more than 5 years old)

Motor vehicle expenses (e.g. fuel and oil, insurance and registration, service and repairs):

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- Log book percentage:

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- Kilometre method (limited to 5,000kms)

Make, model and engine capacity of the vehicle:

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- Estimated number of kilometres travelled for the tax year or details of trips

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New motor vehicles purchased (if log book)

- Provide dealer invoice and loan contract (if financed)
- Log book percentage

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TRAVEL EXPENSES

Taxi, airfares, parking, train fares, tolls, accommodation, hire cars, meals (overnight only)

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WORK RELATED CLOTHING

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SELF-EDUCATION EXPENSES RELATING TO CURRENT OCCUPATION

Course fees, student membership fees, travel expenses, stationery, details of kilometres travelled

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OTHER WORK RELATED EXPENSES

For example: Trade or business tools, journals and /or subscriptions, union fees, home office expenses, telephone/ mobile phone, internet connection, computer hardware and software purchases, sickness and accident insurance premiums, seminars and stationery.

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DONATIONS

To charities and school building funds

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TRAVEL TO TAX AGENT

Make, model and engine capacity of the vehicle

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Estimated number of kilometres travelled or details of trips

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OTHER INFORMATION

PRIVATE HEALTH INSURANCE

Please provide a Private Health Insurance statement for the financial year.

If you do not have private health insurance, please ensure you fill out the spouse details section on page 1 of this checklist. Please list the number of dependents you have.

EDUCATION TAX REFUND

Do you have any children at school?

YES

NO

Are you eligible to receive Family Tax Benefit Part A?

YES

NO

If you answered yes to both of the above questions, you may be eligible for a tax offset for expenses incurred regarding your children's education. Please refer to the Education Tax Refund Checklist, which outlines expenses that can be claimed

MEDICAL EXPENSES

Please provide details of out of pocket medical expenses incurred (if they exceed \$1,500).

Please refer to our Medical Expenses Checklist for more information.