



INDIVIDUAL INCOME TAX RETURN CHECKLIST

INCOME — Have you received any of the following payments:

- Salary or wage from employment, including any allowances as indicated on a payment summary/group certificate?
- Employer lump sum payments, eg. Redundancy?
- Government payments, eg. Youth Allowance, Newstart, Austudy, Sickness, Age Pension, Sole Parent etc.?
- Interest from any source in Australia, eg. bank accounts or term deposits?
- Dividends from companies in Australia, incl. any that have been reinvested?
- Have you sold or disposed of any asset, eg. shares, house, land, precious metals or foreign assets?
- Do you have any other income not described above? (please specify)
 - Employee share schemes
 - Business income
 - Foreign income eg. Pension, annuity, employment etc.
 - Rental properties
 - Trust or Partnership distributions
 - Other: _____

DEDUCTIONS — Have your paid for any of the following expenses:

- Did you use your car for work, other than travel from home to work?
Please provide make/model & rego. Alternatively, you can bring a copy of your logbook.
- Did you travel for your employment and were not reimbursed by your employer?
If you claiming more than the reasonable limit please provide receipts.
- Do you have a work related uniform that is compulsory, occupation specific or protective clothing?
If you were required to work outside, did you purchase any sun protection clothing such as hats, uniforms, gloves, non slip shoes, boots?
- Did you undertake study in relation to your employment which you paid for?
Did you incur costs for travel, books, fees or other items?
- Any other work related expenses such as union fees, professional subscriptions, work related tools or equipment, telephone, computer, internet, stationery, seminars or conferences, home office exp, safety items (safety glasses, sunscreens)?
- Gifts or donations to charitable organisations?
- Other deductions, incl. personal superannuation contributions, income protection/accident insurance etc.

MEDICARE LEVY SURCHARGE, TAX OFFSETS & ADJUSTMENTS

- Do you have private health insurance? Please bring your annual tax statement.
- Have you paid medical expenses relating to **disability aids, attendant care and aged care** in excess of \$2,218 (after receiving any rebates from Medicare and private health funds) for your family? Note: a higher excess of \$5,233 applies for high income earners (single > \$90,000 and families > \$180,000)
- Did you start or cease to be an Australian resident during the year?
- Did you make a superannuation co-contribution?

RENTAL PROPERTY INCOME/DEDUCTIONS

If you have a rental property, please contact our office for a copy of our rental property checklist.

I declare that:

- I have included all income incurred or received by me during the financial year, as detailed in items 1 -24 under the income section of this checklist. Undeclared income subsequently discovered by the ATO may incur additional tax payable, interest and/or penalties.
- I have been made aware of the substantiation requirements during the appointment for any deductions I have claimed.
- I have the necessary evidence to support all deductions, offsets or claims made.

WORKING FROM HOME DEDUCTION

You may be aware that, due to Covid-19, there have been some changes to the way individuals can claim expenses for working from home. If you were required to work from home since 1 March 2020, or if you already work from home and continued to do so, you will need:

- Receipts for any equipment which you may have purchased in order to work from home (e.g. computer, printer)
- Receipts of stationery or other consumables (paper, printer ink etc)
- A diary or genuine estimate of the hours you worked from home, both before and after 1 March 2020
- A total number of phone calls or text messages you made from your own personal phone in relation to work
- A diary or genuine estimate of the work related usage of your internet, and the monthly cost