



BUSINESS ADVISORY & TAXATION

2023 Individual Income Tax Return

CHECKLIST

Name:

NEW CLIENTS – Please complete New Client form

EXISTING CLIENTS - Please complete the following (where applicable) if any of your personal details have changed:

Address:

.....

Postal Address:

.....

Telephone (Home):

Telephone (Mobile):

Telephone (Business):

Email:

Occupation:

Bank Account Details (If different from last year)

Account Name :

BSB: Account No:

Please note: All refunds must now be paid directly into the taxpayer's bank account.

Private Health Cover

Do you have private health cover? YES NO

If yes, please provide a copy of your Fund's Annual Health Statement.

INCOME

Please provide details of any income received from any of the following sources:

- Salary or wages
- JobKeeper Payments
- Interest
- Dividends
- Allowances, earnings, tips, director's fees, etc.
- Employer lump sum payments
- Employment termination payments
- Australian Government allowances and payments
e.g. Newstart, Youth Allowance or Austudy payment
- Australian Government pensions and allowances (Age or Single Parent)
- Australian annuities and superannuation income streams
- Australian superannuation lump sum payments
- Employee share schemes
- Rental Income
- Capital gains
- Foreign source income (including foreign pensions) and foreign assets or property
- Other income

Other relevant information

- Value of HELP liability or a student financial supplement loan or debt \$
- Value of any tax-free Government pensions \$
- Child support paid in 2022 \$

DEDUCTIONS – Please provide evidence for the following:

Work related car expenses

- Cents per kilometre method *(for travel below 5,000 business kms/year)*
No. of kms travelled:
- Log Book method *(Only applies if more than 5,000 business kms travel per year – Valid log book required to be sighted)*

Work related travel expenses

- Accommodation expenses
- Plane, train, hire car, etc *(not personal motor vehicle)*
- Travel diary *(required if travel is for 6 or more nights in a row)*
- Meals and incidental expenses

Work related uniform and other clothing expenses

- Protective clothing *(boots/overalls/high visibility clothing, etc. Note: Jeans, drill trousers/shorts are not protective clothing)*
- Occupation specific clothing *(eg. Chef's trousers)*
- Non-compulsory uniform *(eg. Banks where fabric is exclusive to employer)*
- Compulsory uniform *(Army, Navy, Police, etc)*
- Dry cleaning, mending/repairs *(only applies to above categories)*
- Sun protection products, e.g. sunscreen and sunglasses *(where a person's occupation requires them to work outdoors)*

Work related self-education (for courses taken at educational institution)

- Course fees
- Books and stationery
- Seminars
- Travel

Other work related expenses

- Computer hardware *(Date of purchase required for items over \$300)*
- Computer consumables and internet
- Telephone/mobile phone *(For claims more than \$50 - You must now be able to substantiate your claim by keeping a 4 week log of your calls)*
- Tools and equipment *(Date of purchase required for items over \$300)*
- Subscriptions and professional memberships
- Union fees
- Journals/periodicals
- Professional development
- Work from home hours (New Rate @.67cph) *Please note that if this method is used, you cannot claim any computer consumables, printing & stationery costs, phone or internet costs, equipment, utilities, etc for the period you are claiming.*

Other types of deductions

- Gifts or donations (*does not include raffle tickets*)
- Cost of managing tax affairs
- Income protection insurance
- Audit insurance

Tax offsets/rebates

- Did you receive an Australian superannuation income stream? YES NO
- If so, how much? \$

ADDITIONAL INFORMATION

Spouse details (*if applicable*)

- Did you have a spouse for the full year? YES NO

If you had a spouse for only part of the year, please specify the dates between 1 July 2020 to 30 June 2022 when you had a spouse:

From / / to / /

- What was your spouse's taxable income for the 2022 income year? \$

Spouse's Name: Date of Birth: / /

Did your spouse receive any of the following payments during the 2022 income year:

- Reportable super contributions \$
- Rental property loss \$
- Reportable Fringe Benefits Tax \$

Rental Properties (*if applicable*)

- Interest on loans
 - Council rates
 - Property agent fees/commissions
 - Insurance
 - Water rates
 - Land Tax
 - Repairs and maintenance
 - Gardening/lawn mowing
 - Body Corporate fees
 - Other
- Was the house rented for the entire year? YES NO
- If not, how many weeks was it rented for?