

2017 individual income tax return checklist

Full Name	
Tax File Number	
Date of birth	
ABN (if applicable)	
Address	
Address (postal) (Put 'as above' if the same)	
Telephone contacts	Mobile:
	Business Hours (work) :
	After Hours (home):
Email	
Electronic banking Details (for refund if applicable)	BSB:
	Account Number:
	Account Name:
Main occupation	
Spouse name and TFN	

Please circle YES or NO for each of the items listed

TAXPAYER'S DECLARATION

I DECLARE THAT THE INFORMATION I HAVE PROVIDED IN THE CHECKLIST, INCLUDING ANY ATTACHMENTS, IS TRUE AND CORRECT TO THE BEST OF MY KNOWLEDGE.

I DECLARE THAT I HAVE THE NECESSARY RECEIPTS AND/OR OTHER RECORDS, OR CAN OBTAIN THE NECESSARY WRITTEN EVIDENCE WITHIN A REASONABLE TIME, TO SUPPORT MY CLAIMS.

TAXPAYER'S SIGNATURE:..... DATE:...../...../.....

Income tax return checklist continued

INCOME – Please provide evidence

- 1. Salary or wages \$..... YES/NO
- 2. Allowances, earnings, tips, director’s fees etc \$..... YES/NO
- 3. Employer lump sum payments \$..... YES/NO
- 4. Employment termination payments \$..... YES/NO
- 5. Australian Government allowances & payments like Newstart, youth allowance & Austudy payments
..... \$..... YES/NO
- 6. Australian Government pensions and allowances \$..... YES/NO
- 7. Australian annuities and superannuation income streams \$..... YES/NO
- 8. Australian superannuation lump sum payments \$..... YES/NO
- 9. Attributed personal services income \$..... YES/NO
- 10. Gross Interest \$..... YES/NO
- 11. Dividends \$..... YES/NO
- 12. Employee share schemes \$..... YES/NO
- 13. Distributions from partnerships and/or trusts \$..... YES/NO
- 14. Personal services income (PSI) \$..... YES/NO
- 15. Net income or loss from business (as a sole trader) \$..... YES/NO
- 16. Deferred non-commercial business losses \$..... YES/NO
- 17. Net farm management deposits or repayments \$..... YES/NO
- 18. Capital gains \$..... YES/NO
- 19. Foreign entities:
 - Direct or indirect interests in controlled foreign company..... \$..... YES/NO
 - Transfer of property or services to a non-resident trust..... \$..... YES/NO
- 20. Foreign source income (including foreign pensions) and foreign assets or property
..... \$..... YES/NO
- 21. Rent \$..... YES/NO
- 22. Bonuses from life insurance companies or friendly societies \$..... YES/NO
- 23. Forestry managed investment scheme income \$..... YES/NO
- 24. Other income (please specify below) \$..... YES/NO
.....

Income tax return checklist continued

DEDUCTIONS – Please provide evidence

D1. Work related car expenses

- cents per kilometre method (up to a maximum of 5,000 kms)\$.....YES/NO
- log book method\$.....YES/NO

D2. Work related travel expenses

- Employee domestic travel with reasonable allowance\$.....YES/NO
- If the claim is more than the reasonable allowance rate, do you have receipts for your expenses?\$.....YES/NO
- Overseas travel with reasonable allowance\$.....YES/NO
- Do you have receipts for accommodation expenses?\$.....YES/NO
 - If travel is for 6 or more nights in a row, do you have travel records? (e.g. a travel diary)\$.....YES/NO
- Employee without a reasonable travel allowance\$.....YES/NO
- Did you incur and have receipts for airfares?\$.....YES/NO
 - Did you incur and have receipts for accommodation?\$.....YES/NO
 - Do you have receipts for hire cars (if applicable)?\$.....YES/NO
 - Did you incur and have receipts for meals and incidental expenses?\$.....YES/NO
 - Do you have any other travel expenses?\$.....YES/NO
- Other work-related travel expenses (e.g., a borrowed car, public transport)\$.....YES/NO
(please specify)
-

D3. Work related uniform and other clothing expenses

- Protective clothing\$.....YES/NO
- Occupation specific clothing\$.....YES/NO
- Non-compulsory uniform\$.....YES/NO
- Compulsory uniform\$.....YES/NO
- Conventional clothing\$.....YES/NO
- Laundry expenses (up to \$150 without receipts)\$.....YES/NO
- Dry cleaning expenses\$.....YES/NO
- Other claims such as mending/repairs, etc (please specify)\$.....YES/NO
-

Income tax return checklist continued

D4. Work related self-education expenses

Course taken at educational institution:

- union fees\$.....YES/NO
 - course fees\$.....YES/NO
 - books, stationery\$.....YES/NO
 - travel\$.....YES/NO
 - other (please specify)\$.....YES/NO
-

D5. Other work related expenses

- Home office expenses\$.....YES/NO
 - Computer and software\$.....YES/NO
 - Telephone/mobile phone\$.....YES/NO
 - Tools and equipment\$.....YES/NO
 - Subscriptions and union fees\$.....YES/NO
 - Journals/periodicals\$.....YES/NO
 - Depreciation\$.....YES/NO
 - Sun protection products (i.e., sunscreen and sunglasses)\$.....YES/NO
- Seminars and courses not at an educational institution:
- Any other work related deductions (please specify)\$.....YES/NO
-

Other types of deductions

- D6 . Low value pool deduction.....\$.....YES/NO
 - D7. Interest deductions\$.....YES/NO
 - D8. Dividend deductions\$.....YES/NO
 - D9. Gifts or donations\$.....YES/NO
 - D10. Cost of managing tax affairs\$.....YES/NO
 - D11. Deductible amount of undeducted purchase price of a foreign pension or annuity
-\$.....YES/NO

Income tax return checklist continued

Other types of deductions (continued)

D12. Personal superannuation contributions\$.....YES/NO

Full name of fund: Account no:

Fund ABN: Fund TFN:

Do you pass the 10% test?\$.....YES/NO

Have you provided the fund a notice of intention to deduct the contribution?YES/NO

Has this notice been acknowledged by the fund?YES/NO

D13. Deduction for project pool\$.....YES/NO

D14. Forestry managed investment scheme deduction\$.....YES/NO

D15. Other deductions (please specify)\$.....YES/NO

.....

L1. Tax losses of earlier income years\$.....YES/NO

Income tax return checklist continued

Tax offsets/rebates – Please provide evidence

- T1. Are you a senior Australian or a pensioner?\$.....YES/NO
- T2. Did you receive an Australian superannuation income stream?\$.....YES/NO
- T3. Did you make superannuation contributions on behalf of your spouse? ..\$.YES/NO
- T4. Did you live in a remote area of Australia or serve overseas with the Australian defence force or the UN armed forces in 2017?\$.....YES/NO
- T5. Did you have net medical expenses for disability aids, attendant care or aged care in the 2017 income year?.....\$.....YES/NO
- T6. Did you maintain a dependant who is unable to work due to invalidity or carer obligations in the 2017 income year?.....\$.YES/NO
- T7. Are you entitled to claim the landcare and water facility tax offset?\$.YES/NO
- T8. Are you involved in the early stage venture capital limited partnership?....\$.YES/NO
- T9. Are you an early stage investor in the early stage innovation company?...\$.YES/NO
- T10. Are you entitled to any other non-refundable tax offset?.....\$.YES/NO
- T11. Are you entitled to any other refundable tax offsets?.....\$.YES/NO
-

Income tax return checklist continued

Other relevant information

A. Are you entitled to the Medicare levy exemption or reduction in 2017 income year? YES/NO
(If yes, please specify):
.....

B. Did you and your spouse/dependants have private health insurance in the 2017 income year?
(If yes, please provide the annual statement received from your health fund)..... YES/NO

C. Were you under the age of 18 on 30 June 2017?..... YES/NO

D. Did you become an Australian tax resident at any time during the income year? YES/NO

E. Did you cease to be an Australian tax resident at any time during the income year? YES/NO

F. Did you make a non-deductible (non-concessional) personal super contribution? \$ YES/NO

G. Do you have a HECS liability, Student Financial Supplement Loan debt?, Student Start-up Loan debt or Trade Support Loan debt? \$..... YES/NO

H. Are you a working holiday maker in Australia on a 417 (working holiday) visa or 462 (working holiday) visa?..... YES/NO

I. Did a trust or company distribute income to you in respect of which Family Trust Distribution Tax (FTDT) was paid by the trust or company?\$..... YES/NO

J. Do you have a loan with a private company at 30 June 2017 or has such a loan amount been forgiven in the 2017 income year? Has private company made a payment to you in the 2017 income year (other than a dividend)? or have such a loan amount forgiven? (If yes, please specify)
..... \$..... YES/NO

K. Did you receive any benefit from an employee share acquisition scheme?..... YES/NO

L. Family Tax Benefit ('FTB'):

– Did you have care of a dependent child in 2017 income year?.....\$..... YES/NO

– Did you or your spouse receive FTB through the Department of Human Services in 2017 income year?.....\$..... YES/NO

M. Income tests information

– Do you have any reportable fringe benefits amounts in 2017?\$..... YES/NO

– Do you have any reportable employer superannuation contributions in 2017?
.....\$..... YES/NO

– Did you receive any tax-free government pensions in 2017?\$..... YES/NO

Income tax return checklist continued

– Did you receive any target foreign income in 2017?\$..... YES/NO

– Did you have a net financial investment loss in 2017?\$..... YES/NO

- Did you have a net rental property loss in 2017?\$.....YES/NO
- Did you pay child support in 2017?\$.....YES/NO
- Number of dependent children? YES/NO

N. Spouse details (if applicable)

- Did you have a spouse for the full year from 1 July 2016 to 30 June 2017?YES/NO
 - If you had a spouse for only part of the income year, please specify the dates between 1 July 2016 to 30 June 2017 when you had a spouse:
From ____ / ____ / _____ to ____ / ____ / _____
- What was your spouse's taxable income for the 2017 income year?.....\$.....
- Does your spouse have a share of trust income on which the trustee is assessed under Section 98 that has not been included in your spouse's taxable income \$..... YES/NO
- Did a trust or company distribute income to your spouse in respect of which family trust distribution tax was paid by the trust or company for the 2017 income year? \$..... YES/NO
- Did your spouse have any reportable fringe benefits amounts for the 2017 income year?\$.....YES/NO
- Did your spouse receive any Australian Government pensions or allowances (not including exempt pension income) in the 2017 income year?.....\$..... YES/NO
- Did your spouse receive any exempt pension income in the 2017 income year? \$..... YES/NO
- Does your spouse have any reportable super contributions for the 2017 income year?\$.....YES/NO
- Did your spouse receive any tax-free government pensions paid under the *Military Rehabilitation and Compensation Act 2004*?\$..... YES/NO
- Did your spouse receive any 'target foreign income' in the 2017 income year? \$..... YES/NO
- Did your spouse have a total net investment loss (i.e., the total of any financial investment loss and a rental property loss) for the 2017 income year?...\$..... YES/NO
- Did your spouse pay child support during the 2017 income year?.....\$..... YES/NO
- If your spouse is aged between their preservation age and 59 years old, did they receive a superannuation lump sum (other than a death benefit) during the 2017 income year that included a taxed element that does not exceed their low rate cap? \$..... YES/NO

Dated the day of201.....

.....

Signature of taxpayer

.....

Name (print)

RENTAL PROPERTY CHECKLIST

For the year ended 30 June 2017

PREPARE A SEPARATE WORKSHEET FOR EACH PROPERTY

Address of rental property

Number of weeks rented during financial year

Date the property first earned rental income/...../.....

Date of acquisition of the rental property/...../.....

Your percentage ownership in the property%

INCOME

Rental Income

Other Income

Total Income

EXPENSES

D Advertising

E Body Corporate

F Borrowing Expense

G Cleaning

H Council Rates

I Capital Allowance

J Gardening / Lawn Mowing

K Insurance

L Interest on Loan

M Land Tax

N Legal Fees

O Agents Commission

P Repairs & Maintenance

Q Capital Works Deduction

R Stationary, Telephone, Postage

S Travel

T Water

U Sundries

Total Expenditure

NET RENT

Capital Items Purchased:

<u>Date</u>	<u>Description</u>	<u>Amount</u>
-------------	--------------------	---------------

...../...../.....
-------------------	-------	-------

...../...../.....
-------------------	-------	-------

...../...../.....
-------------------	-------	-------