

2022 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 – Make of Car

- cents per kilometer method (up to a maximum of 5,000 kms)\$.....YES/NO
- log book method ...(Logbook covering 12 weeks to be supplied as well as details of expenses – fuel, rego, insurance, repairs etc. If new vehicle invoice & finance agreement).....\$.....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

Compulsory uniform\$.....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 – **MUST RELATE TO YOUR CURRENT OCCUPATION:**

- education 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 (PLEASE PROVIDE WORK-USE %)

- Home office expenses\$.....YES/NO
- Were you required to work from home due to COVID-19?.....\$.....YES/NO
- If yes above, provided **total hours worked** from home from **1 July to 30 June**.....
- Computer and software\$.....YES/NO
- Telephone/mobile phone\$.....YES/NO
- Internet.....\$.....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.....\$.....YES/NO
- 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
 - Interest charged by the ATO (e.g., including SIC and GIC)\$.....YES/NO

– Litigation Costs\$.....YES/NO

– Other expenses incurred in 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:

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

Has this notice been acknowledged by the fund? (Please attach).....YES/NO

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

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

D15. Other deductions (please specify, eg. Income Protection Insurance)\$.....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 2022?\$.....YES/NO
 - T5. Did you maintain a dependant who is unable to work due to invalidity or carer obligations in the 2022 income year?\$.....YES/NO
 - T6. Are you entitled to claim the landcare and water facility tax offset?\$.....YES/NO
 - T7. Are you involved in the early stage venture capital limited partnership?....\$.....YES/NO
 - T8. Are you an early stage investor in the early stage innovation company?...\$.....YES/NO
 - T9. Are you entitled to any other non-refundable tax offset?.....\$.....YES/NO
 - T10. Are you entitled to any other refundable tax offsets?.....\$.....YES/NO
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Income tax return checklist continued

Other relevant information

A. Are you entitled to the Medicare levy exemption or reduction in 2022 income year? YES/NO
(If yes, please specify and supply Medicare Exemption Certificate for the year):

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B. Did you and your spouse/dependants have private health insurance in the 2022 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 2022? YES/NO

D. Did you become an Australian tax resident at any time during the income year? If so please supply what Visa you are on and date of arrival in Australia..... YES/NO

E. Did you cease to be an Australian tax resident at any time during the income year? If so please supply the date you emigrated YES/NO

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

G. Do you have a HELP 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 2022 or has such a loan amount been forgiven in the 2022 income year? Has a private company made a payment to you in the 2022 income year (other than a dividend)? or have you had 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 2022 income year?.....\$..... YES/NO

– Did you or your spouse receive FTB through the Department of Human Services in 2022 income year? \$..... YES/NO

M. Income tests information

– Do you have any reportable fringe benefits amounts in 2022? \$..... YES/NO

– Do you have any reportable employer superannuation contributions in 2022?
..... \$..... YES/NO

– Did you receive any tax-free government pensions in 2022? \$..... YES/NO

– Did you receive any target foreign income in 2022? \$..... YES/NO

– Did you have a net financial investment loss in 2022? \$..... YES/NO

– Did you have a net rental property loss in 2022?\$.....YES/NO

Income tax return checklist continued

– Did you pay child support in 2022?\$.....YES/NO

– Number of dependent children?

N. Spouse details (if applicable)

– Did you have a spouse for the full year from 1 July 2021 to 30 June 2022?YES/NO

- If you had a spouse for only part of the income year, please specify the dates between 1 July 2021 to 30 June 2022 when you had a spouse:

From ____ / ____ / _____ to ____ / ____ / _____

– What was your spouse's taxable income for the 2022 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 2022 income year? \$ YES/NO

– Did your spouse have any reportable fringe benefits amounts for the 2022 income year?\$.....YES/NO

– Did your spouse receive any Australian Government pensions or allowances (not including exempt pension income) in the 2022 income year?.....\$..... YES/NO

– Did your spouse receive any exempt pension income in the 2022 income year? \$ YES/NO

– Does your spouse have any reportable super contributions for the 2022 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 2022 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 2022 income year?...\$..... YES/NO

– Did your spouse pay child support during the 2022 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 2022 income year that included a taxed element that does not exceed their low rate cap? \$ YES/NO

Dated the day of20.....

.....

Signature of taxpayer

.....

Name (print)

RENTAL PROPERTY CHECKLIST

For the year ended 30 June 2022

PREPARE A SEPARATE WORKSHEET FOR EACH PROPERTY

Address of rental property

Number of weeks rented during financial year

Dates property was **genuinely** available for rent 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 Pest Control
P Agents Commission
Q Repairs & Maintenance
R Capital Works Deduction
S Stationary, Telephone, Postage
U Water
V Sundries
Total Expenditure

NET RENT

Capital Items Purchased:

<u>Date</u>	<u>Description</u>	<u>Amount</u>
...../...../.....
...../...../.....

...../...../.....

At Teamwork Accounting we have extended our services to areas that complement our tax advice, to better assist you.

1. Are you happy with your current superannuation provider & comfortable with how your super is invested?.....YES / NO
2. When was the last time you reviewed your personal insurances?.....
 - Has anything significant changed in your situation since then? (children / mortgage / business etc.) Circle what's changed.
3. Are you considering any investment purchases or sales (business / property / shares) in the next 18 months?.....YES/NO
 - If yes please give brief details.....
4. When was the last time you reviewed your loans?
 - In the last 18 months?..... YES / NO
 - Do you know your rate?..... YES / NO
5. Did you know that we have an in-house Financial Adviser that can assist with superannuation, investments, personal insurance & wealth creation strategies?.....YES / NO
6. If answered YES to 1-4 would you like to have an obligation free discussion with a Partners Wealth Group professional about how they can assist with the above points?.....YES / NO

Best contact & time for a PWG professional to call is:

- Name.....
- Contact number.....
- Contact email.....