

2023 Individual Income Tax Return Checklist

Full Name	
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	

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

- 01. Salary or wages\$
- 02. Allowances, earnings, tips, director’s fees etc\$
- 03. Employer lump sum payments\$
- 04. Employment termination payments\$
- 05. Australian Government allowances & payments like Newstart, youth allowance & Austudy payments
.....\$
- 06. Australian Government pensions and allowances\$
- 07. Australian annuities and superannuation income streams\$
- 08. Australian superannuation lump sum payments\$
- 09. Attributed personal services income\$
- 10. Gross Interest\$
- 11. Dividends\$
- 12. Employee share schemes\$
- 13. Distributions from partnerships and/or trusts\$
- 14. Personal services income (PSI)\$
- 15. Net income or loss from business (as a sole trader)\$
- 16. Deferred non-commercial business losses\$
- 17. Net farm management deposits or repayments\$
- 18. Capital gains\$
- 19. Foreign entities:
 - Direct or indirect interests in controlled foreign company.....\$
 - Transfer of property or services to a non-resident trust\$
- 20. Foreign source income (including foreign pensions) and foreign assets or property
.....\$
- 21. Rent\$
- 22. Bonuses from life insurance companies or friendly societies\$
- 23. Forestry managed investment scheme income\$
- 24. Other income (please specify below)\$

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)\$
- 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).....\$

D2. Work related travel expenses

Employee domestic travel with reasonable allowance\$

- If the claim is more than the reasonable allowance rate, do you have receipts for your expenses?\$

Overseas travel with reasonable allowance\$

- Do you have receipts for accommodation expenses?\$
- If travel is for 6 or more nights in a row, do you have travel records? (e.g. a travel diary)\$

Employee without a reasonable travel allowance\$

- Did you incur and have receipts for airfares?\$
- Did you incur and have receipts for accommodation?\$
- Do you have receipts for hire cars (if applicable)?.....\$
- Did you incur and have receipts for meals and incidental expenses?\$
- Do you have any other travel expenses?\$

Other work-related travel expenses (e.g., a borrowed car, public transport)\$
(please specify)

D3. Work related uniform and other clothing expenses

Protective clothing\$

Occupation specific clothing\$

Compulsory uniform\$

Laundry expenses (up to \$150 without receipts)\$

Dry cleaning expenses\$

Other claims such as mending/repairs, etc (please specify)\$

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\$
- course fees\$
- books, stationery\$
- travel\$
- other (please specify)\$

D5. Other work related expenses (PLEASE PROVIDE WORK-USE %)

Home office expenses\$

Provided total hours worked from home from 1 July 2022 to 30 June 2023

LOG BOOK Required from 1 March - 30 June 2023

- Computer and Software\$
- Telephone/mobile phone (% Used for WORK).....\$
- Internet...(% Used for WORK).....\$
- Tools and equipment\$
- Subscriptions and union fees\$
- Journals/periodicals\$
- Depreciation\$
- Sun protection products (i.e., sunscreen and sunglasses)\$
- Seminars and courses not at an educational institution.....\$
- Any other work related deductions (please specify)\$

Other types of deductions

- D6 . Low value pool deduction.....\$
- D7. Interest deductions\$
- D8. Dividend deductions\$
- D9. Gifts or donations\$
- D10. Cost of managing tax affairs
 - Interest charged by the ATO (e.g., including SIC and GIC)\$

– Litigation Costs\$

– Other expenses incurred in managing tax affairs\$

D11. Deductible amount of undeducted purchase price of a foreign pension or annuity

.....\$

Income tax return checklist continued

Other types of deductions (continued)

D12. Personal superannuation contributions\$

Full name of fund: Account no:

Fund ABN: Fund TFN:

Have you provided the fund a notice of intention to deduct the contribution?

Has this notice been acknowledged by the fund? (Please attach).....

D13. Deduction for project pool\$

D14. Forestry managed investment scheme deduction\$

D15. Other deductions (please specify, eg. Income Protection Insurance)\$

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L1. Tax losses of earlier income years\$

Income tax return checklist continued

Tax offsets/rebates – Please provide evidence

- T1. Are you a senior Australian or a pensioner?\$
- T2. Did you receive an Australian superannuation income stream?\$
- T3. Did you make superannuation contributions on behalf of your spouse? \$
- T4. Did you live in a remote area of Australia or serve overseas with the Australian defence force or the UN armed forces in 2023?\$
- T5. Did you maintain a dependant who is unable to work due to invalidity or carer obligations in the 2023 income year ?.....\$
- T6. Are you entitled to claim the landcare and water facility tax offset?\$
- T7. Are you involved in the early stage venture capital limited partnership?..\$
- T8. Are you an early stage investor in the early stage innovation company?.\$
- T9. Are you entitled to any other non-refundable tax offset?.....\$
- T10. Are you entitled to any other refundable tax offsets?.....\$

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Income tax return checklist continued

Other relevant information

A. Are you entitled to the Medicare levy exemption or reduction in 2023 income year? *(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 2023 income year? *(If yes, please provide the annual statement received from your health fund):*

C. Were you under the age of 18 on 30 June 2023?

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...

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

F. Did you make a non-deductible (non-concessional) personal super contribution? \$

G. Do you have a HELP liability, Student Financial Supplement Loan debt?, Student Start-up Loan debt or Trade Support Loan debt?\$

H. Are you a working holiday maker in Australia on a 417 (working holiday) visa or 462 (working holiday) visa?

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?

J. Do you have a loan with a private company at 30 June 2023 or has such a loan amount been forgiven in the 2023 income year? Has a private company made a payment to you in the 2023 income year (other than a dividend)? or have you had such a loan amount forgiven? *(If yes, please specify)*

.....\$

K. Did you receive any benefit from an employee share acquisition scheme? ..

L. Family Tax Benefit ('FTB'):

– Did you have care of a dependent child in 2023 income year?.....\$

– Did you or your spouse receive FTB through the Department of Human Services in 2023 income year?

.....\$

M. Income tests information

– Do you have any reportable fringe benefits amounts in 2023?

– Do you have any reportable employer superannuation contributions in 2023?

.....\$

– Did you receive any tax-free government pensions in 2023?

– Did you receive any target foreign income in 2023?

– Did you have a net financial investment loss in 2023?

– Did you have a net rental property loss in 2023?\$

Income tax return checklist continued

– Did you pay child support in 2023?\$

– Number of dependent children?

N. Spouse details (if applicable)

– Did you have a spouse for the full year from 1 July 2022 to 30 June 2023?

- If you had a spouse for only part of the income year, please specify the dates between 1 July 2022 to 30 June 2023 when you had a spouse:

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

– What was your spouse’s taxable income for the 2023 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 \$

– 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 2023 income year? \$

– Did your spouse have any reportable fringe benefits amounts for the 2023 income year?\$

– Did your spouse receive any Australian Government pensions or allowances (not including exempt pension income) in the 2023 income year?.....\$

– Did your spouse receive any exempt pension income in the 2023 income year? \$

– Does your spouse have any reportable super contributions for the 2023 income year?\$

– Did your spouse receive any tax-free government pensions paid under the *Military Rehabilitation and Compensation Act 2004*?\$

– Did your spouse receive any ‘target foreign income’ in the 2023 income year? \$

– 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 2023 income year?...\$

– Did your spouse pay child support during the 2023 income year?.....\$

– 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 2023 income year that included a taxed element that does not exceed their low rate cap? \$

Dated the day of20.....

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Signature of taxpayer

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