

Client details form - individual tax return

| | |
|--|---|
| 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: |
| Occupation | |
| | <p>Do you run your own business as a sole trader? YES/NO</p> <p>Do you run your own business in a company, trust or partnership? YES/NO</p> |

| | |
|---|--|
| Spouse's full name (Please include married/de facto/same-sex) | |
| Spouse's date of birth | |
| Spouse's TFN | |
| Approximate Income (if known) | |



2024 Individual Tax Return Checklist

| Income – Please provide evidence | Yes | No | Unsure |
|--|-----|----|--------|
| 1. Salary or wages | | | |
| 2. Allowances, earnings, tips, director’s fees etc. | | | |
| 3. Employer lump sum payments | | | |
| 4. Employment termination payments | | | |
| 5. Australian Government allowances and payments like Jobseeker, Youth Allowance and Austudy payments | | | |
| 6. Australian Government pensions and allowances | | | |
| 7. Australian annuities and superannuation income streams | | | |
| 8. Australian superannuation lump sum payments | | | |
| 9. 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 a controlled foreign company | | | |
| – Direct or indirect 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) | | | |



| Deductions – Please provide evidence | Yes | No | Unsure |
|---|------------|-----------|---------------|
| D3. Work-related clothing, laundry and dry cleaning expenses | | | |
| Protective clothing | | | |
| Occupation specific clothing | | | |
| Non-compulsory uniform | | | |
| Compulsory uniform | | | |
| Conventional clothing | | | |
| Laundry expenses (up to \$150 may be claimed without receipts) | | | |
| Dry cleaning expenses | | | |
| Other claims such as mending/repairs, etc. (please specify)..... | | | |
| Have any clothing, laundry and dry cleaning expenses been reimbursed by your employer? | | | |
| D4. Work-related self-education expenses | | | |
| Course taken at educational institution: | | | |
| – Student union fees | | | |
| – Course fees | | | |
| – Books, stationery | | | |
| – Travel | | | |
| – Others (please specify)..... | | | |
| Have any self-education expenses been reimbursed by your employer? | | | |



| Deductions – Please provide evidence | Yes | No | Unsure |
|---|-----|----|--------|
| D5. Other work-related expenses | | | |
| Home office expenses – <i>advise total hours worked from home.....</i> | | | |
| Computer and software | | | |
| Telephone/mobile phone | | | |
| Tools and equipment | | | |
| Subscriptions and union fees | | | |
| Journals/periodicals | | | |

| Deductions – Please provide evidence | Yes | No | Unsure |
|--|-----|----|--------|
| D5. Other work-related expenses (continued...) | | | |
| Depreciation | | | |
| Sun and other protection products (e.g., sunscreen, sunglasses, facemasks) | | | |
| Seminars and courses not at an educational institution | | | |
| Any other work-related deductions (please specify)..... | | | |
| Have any other work-related expenses been reimbursed by your employer? | | | |
| 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 <ul style="list-style-type: none"> • 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 | | | |
| D12. Personal superannuation contributions | | | |
| Full name of fund: Account number: Fund ABN: Fund TFN: | | | |



| Deductions – Please provide evidence | Yes | No | Unsure |
|--|------------|-----------|---------------|
| – Have you provided the fund a notice of intention to deduct the contribution? | | | |
| – Has this notice been acknowledged by the fund? | | | |
| D13. Deduction for project pool | | | |
| D14. Forestry managed investment scheme deduction | | | |
| D15. Other deductions (please specify) | | | |
| Have any amounts at D6 to D15 been reimbursed by your employer? | | | |
| | | | |
| L1. Tax losses of earlier income years | | | |

| Tax offsets/rebates – Please provide evidence | Yes | No | Unsure |
|--|------------|-----------|---------------|
| 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 force in the 2024 income year? | | | |
| T5. Did you maintain a dependant who is unable to work due to invalidity or carer obligations in the 2024 income year? | | | |
| T6. Are you entitled to claim the landcare and water facility tax offset? | | | |
| T7. Are you involved in an early stage venture capital limited partnership? | | | |
| T8. Are you an early stage investor in an early stage innovation company? | | | |
| T9. Are you entitled to any refundable tax offsets? | | | |



| Other relevant information – Please provide evidence | Yes | No | Unsure |
|--|------------|-----------|---------------|
| A. Are you entitled to the Medicare levy exemption or reduction in the 2024 income year? | | | |
| (If yes, please specify) | | | |
| B. Did you and your spouse/dependants have private health insurance in the 2024 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 2024? | | | |
| D. Did you become an Australian tax resident at any time during the income year? | | | |
| E. Did you cease to be an Australian tax resident at any time during the income year? | | | |
| F. Did you make a non-deductible (i.e., non-concessional) personal super contribution? | | | |
| G. Do you have a HELP liability, VET Student Loan, Student Financial Supplement Loan, Student or ABSTUDY Start-up Loan, or Trade Support Loan? | | | |
| H. Are you a working holiday maker in Australia on a 417 (working holiday) visa, a 462 (work and holiday) visa, a 408 (COVID-19 pandemic event) visa or a bridging visa relating to application of a 417 or 462 visa? What is your ‘home country’ (e.g., where you are a national)? Country name: If you are a working holiday maker – do you believe you are an Australian tax resident for the 2024 income year? | | | |
| 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 2024 or has such a loan amount been forgiven in the 2024 income year? Has a private company made a payment to you in the 2024 income year (other than a dividend)? 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 the 2024 income year? | | | |



| Other relevant information – Please provide evidence | Yes | No | Unsure |
|--|-----|----|--------|
| – Did you or your spouse receive FTB through Services Australia in the 2024 income year? | | | |

| Other relevant information – Please provide evidence | Yes | No | Unsure |
|--|-----|----|--------|
| Income tests information in the 2024 income year | | | |
| – Did you have any reportable fringe benefits amounts? | | | |
| – Did you have any reportable employer superannuation contributions? | | | |
| – Did you receive any tax-free government pensions? | | | |
| – Did you receive any target foreign income? | | | |
| – Did you have a net financial investment loss? | | | |
| – Did you have a net rental property loss? | | | |
| – Did you pay child support? | | | |
| – Number of dependent children? | | | |
| Spouse details (if applicable) for the 2024 income year | | | |
| – Did you have a spouse for the full year from 1 July 2023 to 30 June 2024? If you had a spouse for only part of the income year, please specify the dates between 1 July 2023 to 30 June 2024 when you had a spouse: From ____ / ____ / _____ to ____ / ____ / _____ | | | |
| – What was your spouse's taxable income ? \$ | | | |
| – 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? | | | |
| – Did your spouse have any reportable fringe benefits amounts? | | | |
| – Did your spouse receive any Australian Government pensions or allowances (not including exempt pension income)? | | | |
| – Did your spouse receive any exempt pension income? | | | |



| Other relevant information – Please provide evidence | Yes | No | Unsure |
|--|------------|-----------|---------------|
| – Did your spouse receive any tax-free government pensions paid under the <i>Military Rehabilitation and Compensation Act 2004</i> ? | | | |
| – Does your spouse have any reportable employer superannuation contributions or deductible personal superannuation contributions? | | | |
| – Did your spouse receive any ‘target foreign income’? | | | |
| – Did your spouse have a total net investment loss (i.e., the total of any financial investment loss and a rental property loss)? | | | |
| – Did your spouse pay child support? | | | |
| – If your spouse is 59 years old (i.e., they have reached their preservation age but are yet to turn 60), did they receive a superannuation lump sum (other than a death benefit) that included a taxed element that does not exceed their low rate cap? | | | |

Additional notes/concerns:

Dated:

.....

Signature of taxpayer

.....

Name (print)