

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	
Approximate Income (if known)	



2025 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	AMOUNT
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	AMOUNT
D5. Other work-related expenses	
Home office expenses – <u>advise total hours worked from home.....</u>	
Computer and software	
Telephone/mobile phone	
Tools and equipment	
Subscriptions and union fees	
Journals/periodicals	
Deductions – Please provide evidence	AMOUNT
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 un-deducted purchase price of a foreign pension or annuity	
D12. Personal superannuation contributions	
Full name of fund:	
Fund ABN:	Account number:

