

# INCOME TAX RETURN Individuals Checklist



## 1. Please advise if your address and/or contact details including email address have changed.

---

## 2. New Clients

---

- Full name(s)
- Residential Address
- Postal Address
- Telephone
- Email
- Date of Birth
- Tax File Number
- Have you included a copy of your previous year's Income Tax Return?

## 3. Electronic Refund

---

- Please provide full bank account details for ATO electronic payment.

Account Name

BSB

Account Number

## 4. Amount of child support paid by you

---

## 5. Details of any tax free government pensions

---

## 6. Did you make personal after tax superannuation contributions for yourself?

---

This is the type of contribution that would count for government co-contribution

## 7. Spouse Details (if Hoffman Kelly does not complete your spouse tax return):

---

- Full Name of Spouse
- Date of Birth of Spouse
- Date Married or De Facto (if this occurred during the financial year)
- Date Separated (if this occurred during the financial year)
- Taxable Income of Spouse
- Reportable Fringe Benefits of Spouse
- Reportable Superannuation Contributions of Spouse
- Net Investment Losses of Spouse
- Name, Date of Birth of any Dependents (e.g. children)

## INCOME

### 1. Wages, Pensions and Government Benefits

- PAYG Payment Summary (Previously known as "Group Certificate")  
Note: You may not receive one if your employer is lodging through STP.
- Your main occupation title

### 2. Allowances, Earning, Tips, Directors Fees

- Please advise of any income not disclosed on the PAYG Payment Summary Statement

### 3. Employment Termination

- ETP Payment Summary

### 4. Superannuation Income

- Income Stream Payment Summary (Previously known as "Pensions")
- Lump Sum Payment Summary

### 5. Interest received

- Bank Accounts and Total Interest (show Withholding tax if applicable)

### 6. Dividends, Trust (Managed Funds) and partnership distributions

- Dividend Advice Slips, or provide summary of share names and HIN/SRN
- Trust/Managed Fund Annual Tax Summaries (taxable on record date)
- Details of Partnership or private Trust Distributions

### 7. Rental income

- Itemised Rental Property details are required by the ATO
- Refer to Rental Property Checklist available on our website

### 8. Capital gains tax

- Relates to the sale of assets acquired after 19/09/85 and includes rental properties, land, shares, units in unit trusts, art, coin collections, etc. Please provide the following details:
  - Original purchase price and date of purchase
  - Selling price and date of sale
  - Costs of acquisition (e.g. legals, stamp duty, etc.)
  - Costs of sale (e.g. commission, legals advertising, etc.)

### 9. Foreign source income (including foreign pensions)

### 10. Bonus from life insurance or friendly society policy

### 11. Did you receive any benefit from an Employee Shares Acquisition Scheme?

### 12. Other income (please specify)

## DEDUCTIONS

### D1. Work related car expense claims (motor vehicle claims)

- *If claim is less than 5000 kms*
  - Total No. Kms traveled
- *If using log book*
  - Business use % (from log book)
  - Registration
  - Insurance and RACQ
  - Fuel and oil (or estimate of total kms traveled if unknown)
  - Repairs and maintenance
  - Details of vehicle Loan, HP or Lease
  - Invoice and Finance contract from purchase (if new)

*Note: Log Books are valid for 5 years and you must keep odometer readings at 30 June each year.*

### D2. Other work related travel expenses (tolls, parking, accommodation etc)

### D3. Work related uniform and other clothing expenses

- Protective Clothing, including sun protection
- Occupation Specific Clothing
- Non-compulsory uniform
- Laundry (up to \$150 without receipts)

### D4. Work related self education expenses (formal courses)

- Student Union fees
- Course fees (excluding HECS payments)
- Travel
- Text books
- Other (please specify)

### D5. Other work related expenses

Seminars and courses not at an educational institution but related to your work

- Seminar or course fees
- Travel
- Other

Home office expenses (electricity, internet, stationery, office furniture)  
- Hours per week working from home

Computer / software or other Depreciable Equipment Purchased

Mobile / Home Phone (including percentage of business/work use)

Tools and equipment

Subscriptions, union fees or professional body fees

Expenses in relation to allowances

Other work deductions (please specify)

**D6. Interest and dividend deductions (e.g. loans for shares etc)**

**D7. Gifts and donations, including to political parties**

**D8. Cost of managing tax affairs (e.g. tax agent fees, travel to agent - kms)**

**D9. Non-employer sponsored (personal) superannuation contributions**

Full name of Fund

Policy Number

(Please enclose Section 290-170 Notice if you intend to claim a deduction)

**D10. Other (e.g. Income Protection Insurance)**

## TAX OFFSETS AND REBATES

**M2. Do you and all your dependents have Private Health Insurance?**

- Please provide the annual "Private Health Insurance Annual Statement" issued by your fund.
- If not, please ensure you have completed the spouse details section on page 1

**T3. Superannuation contributions on behalf of spouse**

Please ensure you have completed the spouse details section on page 1

**T4. Is your normal place of residence in a 'remote zone', or did you serve overseas with the Defence Force this year?**

**T5. Did you maintain a parent, parent-in-law or invalid relative?**

**Other** For years relating to 2018-2019 or previous - Do you have family (net out of pocket) medical expenses over \$2,377 relating to disability aids, attendant or aged care? (Not available from 1 July 2019)

## OTHER

**1. Do you have a HECS / HELP debt?**

**2. Are you entitled to the Medicare exemption / reduction (exemption certificate obtained?**

**3. Did you become or did you cease to be a tax resident of Australia during the year?**

**4. Do you have any capital losses from sale of assets in previous years to carry forward (new clients only)?**