



MELBOURNE  
**ACCOUNTING**  
PARTNERS

# INDIVIDUALS TAX CHECKLIST



Income Tax Return

## CLIENT DETAILS

**Name:** (Mr/Mrs/Ms/Miss) \_\_\_\_\_  
TFN and ABN (If any) \_\_\_\_\_  
Residential Address (same/new) \_\_\_\_\_  
Postal Address \_\_\_\_\_  
Contact Number (Work, Home, Mobile) \_\_\_\_\_  
Email: \_\_\_\_\_  
Date of Birth:     /     /     \_\_\_\_\_  
Occupation: \_\_\_\_\_  
Are you a resident for Tax? (Y/N) Are you in Aust. On VISA (Y/N) > If applicable> Type: \_\_\_\_\_  
Name of spouse/ De facto \_\_\_\_\_  
If Married/Defacto in the financial year. What date did this occur? \_\_\_\_\_

## INCOME

Salary and Wages \$ \_\_\_\_\_ (or provide your PAYG Payment Summary)  
PAYG Withholding \$ \_\_\_\_\_  
Centrelink \$ \_\_\_\_\_  
Gross Interest earned in bank accounts \$ \_\_\_\_\_  
Income from partnerships&/or Trusts \$ \_\_\_\_\_  
Cap. Gains/Losses: Any Assets disposed of. \$ \_\_\_\_\_  
Dividends \$ \_\_\_\_\_  
Other Income \$ \_\_\_\_\_

## DEDUCTIONS

Work-related car expenses (running Costs) \$ \_\_\_\_\_  
Parking fees & Tolls \$ \_\_\_\_\_  
Business Kms Travelled \$ \_\_\_\_\_  
**Other Work related Travel expenses**  
Employee domestic travel with reasonable allowance \$ \_\_\_\_\_  
*if a claim is more than reasonable allowance rates  
do you have receipts for the expense?*  
Overseas Travel with reasonable allowance \$ \_\_\_\_\_  
*Do you have a travel Diary/Itinerary  
and accommodation receipts?*

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### Work related uniform/other clothing expenses

Protective Clothing \$ \_\_\_\_\_  
Occupation Specific Clothing \$ \_\_\_\_\_  
Laundry (up to \$150 without receipts) \$ \_\_\_\_\_  
Dry Cleaning \$ \_\_\_\_\_  
Other Expenses \$ \_\_\_\_\_

### Work related Self education expenses

#### (Formal Courses)

Student Union Fees \$ \_\_\_\_\_  
Course Fees \$ \_\_\_\_\_  
Travel for Education purposes \$ \_\_\_\_\_  
Text Books \$ \_\_\_\_\_  
Other(specify): \_\_\_\_\_

### Other Work related Expenses Seminar and course not an educational institution but are work related:

Seminar and course fees \$ \_\_\_\_\_  
Travel \$ \_\_\_\_\_  
Calculators and & Electrical Organisers \$ \_\_\_\_\_  
Home Office \$ \_\_\_\_\_  
Computers & Software (including purchase date) \$ \_\_\_\_\_  
Telephone Expenses \$ \_\_\_\_\_  
Internet Expenses \$ \_\_\_\_\_  
Tools & Equipment \$ \_\_\_\_\_  
Diary and Stationary \$ \_\_\_\_\_  
Briefcase used for employment \$ \_\_\_\_\_  
Professional Association Membership \$ \_\_\_\_\_

### Subscriptions \$ \_\_\_\_\_

Income Protection Insurance \$ \_\_\_\_\_  
Teaching Aids \$ \_\_\_\_\_  
Accommodation & Meals \$ \_\_\_\_\_  
Wet Weather Gear \$ \_\_\_\_\_  
Sun Protection Products \$ \_\_\_\_\_  
Union Fees \$ \_\_\_\_\_  
HECS/HELP Debt \$ \_\_\_\_\_  
Professional Library \$ \_\_\_\_\_  
Interest and Dividend deductions \$ \_\_\_\_\_  
Gifts and donations, Incl donations to political parties \$ \_\_\_\_\_  
Cost of managing Tax affairs (Tax Agent Fees) \$ \_\_\_\_\_  
Australian Film Industry incentives \$ \_\_\_\_\_

Deductible amount of UPP of Foreign pension/annuity \$ \_\_\_\_\_  
Other Deductions \$ \_\_\_\_\_

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### TAX OFFSETS

Do you have a dependent spouse (without child), child-housekeeper or housekeeper?

Calculate Separate Net Income (SNI) of dependent: \$ \_\_\_\_\_

Do you have Private Health Insurance with hospital cover? (Y/N)

If yes, please provide Health Insurance Name & Policy Number & type of cover:

\_\_\_\_\_

*Please note: The net medical expenses tax offset is being phased out:*

*From 2015–16 until 2018–19, claims for this offset are restricted to net eligible expenses for disability aids, attendant care or aged care)*

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### TAXPAYERS DECLARATION

I declare that the information I have provided in this questionnaire (including any attachments) are true and correct to the best of my knowledge. I declare I have the necessary receipts and other records (or can obtain the necessary written evidence within a reasonable time) to support my claims.

Taxpayer's Signature \_\_\_\_\_

Date: