

2020 Individual Income Tax Return Checklist

Mr/Mrs/Ms/Miss	
Full Name	
Tax File Number	
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:
Fee From Refund facility	YES <input type="checkbox"/> NO <input type="checkbox"/> (this does incur a \$25.00 fee added to account)
Main occupation	

-----Office use only -----

BOUND TAX RETURN	Paper copy <input type="checkbox"/>	Electronic PDF Copy <input type="checkbox"/>
	(Check have updated email address)	
Awaiting documentation <i>(details of documents required)</i>		
Appointment date		
Received documentation		
Accountant (circle)	CK-Direct Client	CK Client-Deb
		Deb-Direct Client

Return required

Required urgently	Yes <input type="checkbox"/>	No <input type="checkbox"/>	
1 Week		1 Month	
2 Weeks		3 Months	

Business Details:

Structure:

GST Registered:..... YES / NO

Name:

ABN:.....

Address:.....

BAS: Qtr 1

Qtr 2

Qtr 3

Qtr 4

Income:

Expenses:

Nett:

Immediate Deduction after 12/5/15: Y / N

Opening Pool Bal.....

Asset Details	Date Purchased

DEDUCTIONS – Please provide evidence

D1. Work related car expenses

Tallied Km / Complete Log Book

- cents per kilometre method (up to a maximum of 5,000 kms) YES/NO
- log book method YES/NO

Have any car expenses been reimbursed by your employer? YES/NO

D2. Work related travel expenses

Employee domestic travel with reasonable allowance YES/NO

- If the claim is more than the reasonable allowance rate, do you have receipts for your expenses? YES/NO

Overseas travel with reasonable allowance YES/NO

- Do you have receipts for accommodation expenses? YES/NO
- If travel is for 6 or more nights in a row, do you have travel records? (e.g. a travel diary) YES/NO

Employee without a reasonable travel allowance YES/NO

- Did you incur and have receipts for airfares? YES/NO
- Did you incur and have receipts for accommodation? YES/NO
- Do you have receipts for hire cars (if applicable)? YES/NO
- Did you incur and have receipts for meals and incidental expenses? YES/NO
- Do you have any other travel expenses? YES/NO

Have any travel expenses been reimbursed by your employer? YES/NO

Other work-related travel expenses (e.g., a borrowed car, public transport) YES/NO

(please specify)

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D3. Work related uniform and other clothing expenses

➤ **Enforced Employer / N/Av Public / Specific Occupation / Aus Ind Registration**

Protective clothing YES/NO

Occupation specific clothing YES/NO

Non-compulsory uniform (Aus Ind Registered No.) YES/NO

Compulsory uniform YES/NO

Conventional clothing YES/NO

Laundry expenses (up to \$150 without receipts) YES/NO

Dry cleaning expenses YES/NO

Other claims such as mending/repairs, etc (please specify) YES/NO

Have any clothing, laundry and dry cleaning expenses been reimbursed by your employer? ... YES/NO

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Income tax return checklist continued

D4. Work related self-education expenses

Course taken at educational institution:

- union fees YES/NO
- course fees YES/NO
- books, stationery YES/NO
- travel YES/NO
- other (please specify) YES/NO

Have any self-education expenses been reimbursed by your employer? YES/NO

D5. Other work related expenses

- Home office expenses (52c/hr) YES/NO
- COVID Home Office (only 80c/hr from 1/3/20 – 30/6/20 no other claims) YES/NO
- Computer and software YES/NO
- Telephone/mobile phone YES/NO
- Tools and equipment YES/NO
- Subscriptions and union fees YES/NO
- Journals/periodicals YES/NO
- Depreciation YES/NO
- Sun protection products (i.e., sunscreen and sunglasses) YES/NO
- Seminars and courses not at an educational institution YES/NO
- Any other work related deductions (please specify) YES/NO

Have any other work related expenses been reimbursed by your employer? YES/NO

Other types of deductions

- D6. Low value pool deduction. YES/NO
- D7. Interest deductions YES/NO
- D8. Dividend deductions YES/NO
- D9. Gifts or donations YES/NO
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- D10. Cost of managing tax affairs YES/NO
 - Interest charged by the ATO (e.g. including SIC & GIC) YES/NO
 - Litigation costs YES/NO
 - Other expenses incurred in managing tax affairs YES/NO
- D11. Deductible amount of undeducted purchase price of a foreign pension or annuity YES/NO

Income tax return checklist continued

Other types of deductions - Continued

- D12. Personal superannuation contributions - \$ YES/NO
Full name of fund:
Account no:
Fund ABN:
Fund TFN:
Have you provided the fund a notice of intention to deduct the contribution? YES/NO
Has this notice been acknowledged by the fund? YES/NO
- D13. Deduction for project pool YES/NO
- D14. Forestry managed investment scheme deduction YES/NO
- D15. Income Protection Insurance YES/NO
- D15a. Other deductions (please specify) YES/NO
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- Have any amounts at D6 to D15 been reimbursed by your employer? YES/NO**

- L1. Tax losses of earlier income years YES/NO

Tax offsets/rebates – Please provide evidence

- T1. Are you a senior Australian or a pensioner? YES/NO
- T2. Did you receive an Australian superannuation income stream? YES/NO
- T3. Did you make superannuation contributions on behalf of your spouse? YES/NO
- T4. Did you live in a remote area of Australia or serve overseas with the Australian defence force or the UN armed forces in 2020? YES/NO
- T5. Did you maintain a dependant who is unable to work due to invalidity or carer obligations?... YES/NO
- T6. Are you entitled to claim the Landcare and water facility tax offset? YES/NO
- T7. Are you involved in an early stage venture capital limited partnership? YES/NO
- T8. Are you an early stage investor in an early stage innovation company? YES/NO
- T9. Are you entitled to any other non-refundable tax offsets? YES/NO
- T10. Are you entitled to any other refundable tax offsets? YES/NO

OFFSETS

- Low Income / Low-Mid Income / Small Business Offset

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Other relevant information

A. Are you entitled to the Medicare levy exemption or reduction in 2020? (DVA or Low Income)..... YES/NO

B. Did you and your spouse/dependents have private health insurance in 2020? YES/NO

(If yes, please provide the annual statement received from your health fund)

Single < 90,000 YES/NO

No.. of days not Liable for Surcharge _____

Couple/Family < \$180,000 YES/NO

B. Number of dependent children? _____

B. Did **NOT** claim the Private Health Rebate from Health Fund..... YES/NO

B. Is your spouse claiming their share of Private Health Rebate YES/NO

C. Were you under the age of 18 on 30 June 2020? YES/NO

D. Did you become an Australian tax resident at any time during the 2020 income year?..... YES/NO

E. Did you cease to be an Australian tax resident at any time during the 2020 income year? YES/NO

F. Did you make a non-deductible (non-concessional) personal super contribution?..... YES/NO

G. Do you have a HELP liability or a Student Financial Supplement Loan debt,
Student Start-up Loan debt or Trade Support Loan debt? YES/NO

H. Are you a working holiday maker in Australia on a 417 (working holiday) visa or
462 (working holiday) visa? YES/NO

I. Did a trust or company distribute income to you in respect of which family trust distribution
tax was paid by the trust or company? YES/NO

J. Do you have a loan with a private company or have such a loan amount forgiven? YES/NO
Has a private company made a payment to you in the 2020 income year (other than a dividend)?
(If yes, please specify)

K. Did you receive any benefit from an employee share acquisition scheme? YES/NO

L. Family Tax Benefit ('FTB'):

– Did you have care of a dependent child in 2020? YES/NO

– Did you or your spouse receive FTB through the Department of Human Services in 2020? YES/NO

M. Income tests information

– Do you have any total reportable fringe benefits amounts in 2020? YES/NO

– Do you have any reportable employer superannuation contributions in 2020? YES/NO

– Did you receive any tax-free government pensions in 2020?..... YES/NO

– Did you receive any target foreign income in 2020? YES/NO

– Did you have a net financial investment loss in 2020? YES/NO

– Did you have a net rental property loss in 2020? YES/NO

– Did you pay child support in 2020?..... YES/NO

Office use

** Check if Surcharge is payable **

Income tax return checklist continued

N. Spouse details (if applicable)

- Did you have a spouse for the full year from 1 July 2019 to 30 June 2020?YES/NO
 - If you had a spouse for only part of the income year, please specify the dates between 1 July 2019 to 30 June 2020 when you had a spouse:
Spouse name
 - From ____ / ____ / _____ to ____ / ____ / _____
- What was your spouse's taxable income for the 2020 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..... YES/NO
- 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 2020 income year? YES/NO
- Did your spouse have any reportable fringe benefits amounts for the 2020 income year? \$ YES/NO
- Did your spouse receive any Australian Government pensions or allowances (not including exempt pension income) in the 2020 income year? YES/NO
- Did your spouse receive any exempt pension income in the 2020 income year?..... YES/NO
- Does your spouse have any reportable super contributions for the 2020 income year? YES/NO
- Did your spouse receive any 'target foreign income' in the 2020 income year? YES/NO
- 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 2020 income year? YES/NO
- Did your spouse pay child support during the 2020 income year?..... YES/NO
- 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 2020 income year which included a taxed element that does not exceed their low rate cap?..... YES/NO

Responsibilities

You are responsible for the reliability, accuracy and completeness of the accounting records, particulars and information provided and disclosure of all material and relevant information. You are required to arrange for reasonable access by us to relevant individuals and documents, and shall be responsible for both the completeness and accuracy of the information supplied to us. Any advice given to you is only an opinion based on our knowledge of your particular circumstances.

You are responsible under self-assessment to keep full and proper records in order to facilitate the preparation of a correct return. If the ATO undertakes an audit of your Tax Return, which is more than just a basic enquiry then any work undertaken by our office under your request will be charged to you.

Dated.....

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Signature of taxpayer

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Name (print)