CHECKLIST - INDIVIDUALS INCOME TAX 2018

Name:				Occu	pation]
Street	Address									
Ph: Mob:	Address									
	s of Dependant Childre	m:								
Names	·	· · · · · · · · · · · · · · · · · · ·		.	6.01.41					
1	Names 1			Date o	of Birth					
3										
		SB:		Acc:			Name:			
l lea thi	s list as a reminder of w	hat to se	and us Att	ach docum	nents only y	where "	DOC" is in	dicate	ıd	
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INCOM	IE									
1	PAYG Payment Sum	maries				Yes		No		DOC
4	Eligible Termination Payments (ETP)					Yes		No		DOC
5	Australian Government Allowances and payments eg. Newstart, Youth Allowance, Austudy						No]	
6	Australian Governme	Australian Government Pensions and A			es	Yes		No		
7/8	Superannuation Pen	Superannuation Pensions and/or Lum				Yes		No		DOC
10	Interest income					Yes		No		
	Name of Bank	(Account	Number	Amou	unt	TFN Ta	-	oint acc Y/N	_
11	Dividends					Yes		No		DOC
12	Employee Share Sch	emes				Yes		No _		DOC
13	Income from Trusts and/or Partnership eg. BT Funds, Colonial, Asgard. Please provide the Annual Taxation State					Yes		No [DOC
18	Capital Gains Events	;								DOC
	Eg. Sale of shares, sale of property, capital returns, winding up of trusts Yes No							1		
	If yes, please provide DOCumentation sh When it was purchased and its cost.			owing:		Yes		No		-]

	When it was sold and funds received	Yes		No				
20	Foreign Source Income	Yes		No	DOC			
21	Rental properties (See next page) Did you purchase a rental property in 17/18? If yes please provide Final Settlement Statement an	Yes d Purchase Cont	ract	No	DOC			
24	Any other income Please provide details of any other income you received in the financial year that does not fit into any of the above categories.							
DEDU	CTIONS				_			
	Please ensure you are able to substantiate all claim	<u>S.</u>						
	Motor Vehicle Did you use your own car for business/work purpose	es? Yes		No				
D1	If Yes, please provide the following:	KM's T	ravelled					
or	(By the way, same rate for all cars now: \$0.68/km)							
D1	Repairs/Services Registration	Lease payments Interest on loan Breakdown covel Other						
D2	Work Related Travel Parking & Tolls Meals Taxi Airfares other	Buomi	,					
D3	Work Related Uniforms Do you have to wear a logo uniform or protective close If yes please provide amounts and details of out of p	J		No				
					<u> </u>			
D4	You can only claim education expenses that related to your work as an employee at the time your were studying. If your self education was to help you get a new job you can't claim your expenses. Generally, the first \$250 is not deductible. If applicable, you can claim: Text Books Travel							
	Stationery	Other						
	Student Union Fees Tuition Fees	Other Other						

Decline in value of computer

Please provide date and detail of purchase, cost and % of use for study if not 100%

	Other Deductible Expenses				
		Amount		Details	
D5	Diary / Stationery / Work Materials				
D5	Union Fees				
D5	Work related Subscriptions				
D5	Work/Investment Seminars				
D5	Mobile Telephone			Work %:	
D5	Home Office			# hours/week:	
D5	Tools & Equipment				
D5	Computer Expenses			Work %	
D9	Donations				
D10	Cost of Managing Tax Affairs				
D7/D8	Interest on other Investment Loans				
D15	Sickness and Accident Insurance				
	Other				
	Other				
	If you are unsure of any claims for a ded will determine if it is deductible. We may	•	the do	cumentation and we	
OTHER	8				
T99	Private Health Insurance				
	Do you have private health cover?		Yes	No D	OC
М2	Spouse				
1412	Spouse's name				
	Spouse date of birth				
	operate date of simil				
	Did you have a spouse for the full financi	No			
	What is their taxable income for the year	\$			
	Does your spouse receive any exempt in		OC		
			Yes		
20	Other possible deductions & Question	ns you may have for i	us.		
			_		