

2023 Individual Income Tax Return Checklist

Full Name	
Tax File Number ('TFN')	
Has your name changed since your last return?	Yes / No If Yes, previous name :
Date of birth ('DOB')	
Are you an Australian resident?	Yes / No / Unsure
ABN (if applicable)	
Address	
Address (postal) <i>(Put 'as above' if the same)</i>	
Telephone contacts	Mobile: Business Hours (work) : After Hours (home):
Email	
Electronic banking details <i>(for refund if applicable)</i>	BSB and Account Number: Account Name:
Main occupation	
Spouse details	Name: TFN and DOB:

Please circle YES or NO for each of the items listed below:

INCOME – Please provide evidence (if applicable)

1. Salary or wages YES/NO
2. Allowances, earnings, tips, director's fees etc. YES/NO
3. Employer lump sum payments YES/NO
4. Employment termination payments YES/NO
5. Australian Government allowances and payments like Youth Allowance, JobSeeker, and Austudy payments YES/NO
6. Australian Government pensions and allowances YES/NO
7. Australian annuities and superannuation income streams YES/NO
8. Australian superannuation lump sum payments YES/NO
9. Attributed personal services income YES/NO
10. Gross Interest YES/NO
11. Dividends YES/NO

- 12. Employee share schemes YES/NO
- 13. Distributions from partnerships and/or trusts YES/NO
- 14. Personal services income ('PSI') YES/NO
- 15. Net income or loss from business (as a sole trader) YES/NO
- 16. Deferred non-commercial business losses YES/NO
- 17. Net farm management deposits or repayments YES/NO
- 18. Capital gains YES/NO
- 19. Foreign entities:
 - Direct or indirect interests in controlled foreign company YES/NO
 - Transfer of property or services to a non-resident trust..... YES/NO
- 20. Foreign source income (including foreign pensions) and foreign assets or property YES/NO
- 21. Rent YES/NO
- 22. Bonuses from life insurance companies or friendly societies YES/NO
- 23. Forestry managed investment scheme income YES/NO
- 24. Other income (please specify below).....YES/NO
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DEDUCTIONS – Please provide evidence (if applicable)

D1. Work-related car expenses

- Cents per kilometre method (up to a maximum of 5,000 business kms) YES/NO
- Log book method 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
- Other work-related travel expenses (e.g., a borrowed car) (please specify)..... YES/NO
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D3. Work-related clothing, laundry and dry cleaning expenses

- Protective clothing YES/NO
- Occupation specific clothing YES/NO
- Non-compulsory uniform 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
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D4. Work-related self-education expenses

Course taken at educational institution:

- union fees YES/NO
- course fees YES/NO
- books, stationery YES/NO
- depreciation YES/NO
- travel YES/NO
- other (please specify) YES/NO
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D5. Other work-related expenses

- Home office expenses YES/NO
- Work from hours...(log book is needed)..... 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:
- Course fees YES/NO
- Travel YES/NO
- Other (please specify) YES/NO
- Any other work related deductions (please specify) YES/NO
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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
- D10. Cost of managing tax affairs YES/NO
- Interest charged by the ATO (e.g., Shortfall Interest Charge and General Interest Charge). 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
- 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. Other deductions (please specify) YES/NO
- L1. Tax losses of earlier income years YES/NO

Tax offsets/rebates – Please provide evidence (if applicable)

- 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?..... 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. Did you make a contribution to an early stage venture capital limited partnership personally, or as an investor in a partnership or trust?..... YES/NO
- T8. Did you acquire newly issued shares in a qualifying 'early stage innovation company' personally, or as an investor in a partnership or trust?..... YES/NO
- T9. Other refundable tax offsets (please specify) YES/NO

Other relevant information for 2022/23

- A. Are you entitled to the Medicare levy exemption or reduction? YES/NO
 (If yes, please specify):
- B. Did you have private health insurance ? YES/NO
- C. Were you under the age of 18 on 30 June 2022? YES/NO
- D. Did you become an Australian tax resident at any time during the income year? YES/NO
- E. Did you cease to be an Australian tax resident at any time during the 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, Student Financial Supplement Loan debt, Student Start-up Loan debtor Trade Support Loan debt? YES/NO
- H. Are you a working holiday maker in Australia on a 417 (working holiday) visa or 462 (work and 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
 (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? YES/NO
 - Did you or your spouse receive FTB through Services Australia? YES/NO
- M. Income tests information
- Do you have any total reportable fringe benefits amounts? YES/NO
 - Do you have any reportable employer superannuation contributions? YES/NO
 - Did you receive any tax-free government pensions? YES/NO
 - Did you receive any target foreign income? YES/NO
 - Did you have a net financial investment loss? YES/NO
 - Did you have a net rental property loss? YES/NO
 - Did you pay child support? YES/NO
 - Number of dependent children? _____
- N. Spouse details (if applicable)
- Did you have a spouse for the full year from 1 July 2022 to 30 June 2023? YES/NO
 - If you had a spouse for only part of the income year, please specify the dates between 1 July 2022 to 30 June 2023 when you had a spouse:
 From ____/____/____ to ____/____/____
 - Did your spouse die during the income year? YES/NO
 - What was your spouse's taxable income for the income year (excluding any First Home Super Save released amounts)? \$_____.

- 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? YES/NO
- Did your spouse have any reportable fringe benefits amounts? YES/NO
- Did your spouse receive any Australian Government pensions or allowances (not including exempt pension income)?..... YES/NO
- Did your spouse receive any exempt pension income?..... YES/NO
- Does your spouse have any reportable super contributions?..... YES/NO
- Did your spouse receive any tax-free government pensions paid under the *Military Rehabilitation and Compensation Act 2004*? YES/NO
- Did your spouse receive any 'target foreign income'?..... 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)? YES/NO
- Did your spouse pay child support?..... YES/NO
- If your spouse is 55 to 59 years old, did they receive a superannuation lump sum (other than a death benefit) that included a taxed element that does not exceed their low rate cap?..... YES/NO

Signature of taxpayer

Name (print)

Dated the day of 20.....