

TAX RETURN CHECKLIST



INCOME	NO	YES	Amount
Salary or wages	<input type="checkbox"/>	<input type="checkbox"/>	\$
Allowances, earnings, tips	<input type="checkbox"/>	<input type="checkbox"/>	\$
Lump Sum payments	<input type="checkbox"/>	<input type="checkbox"/>	\$
Termination payments	<input type="checkbox"/>	<input type="checkbox"/>	\$
Interest	<input type="checkbox"/>	<input type="checkbox"/>	\$
Dividends	<input type="checkbox"/>	<input type="checkbox"/>	\$
Rent	<input type="checkbox"/>	<input type="checkbox"/>	\$
Capital gains (NET)	<input type="checkbox"/>	<input type="checkbox"/>	\$
Personal services	<input type="checkbox"/>	<input type="checkbox"/>	\$
Attributed personal services	<input type="checkbox"/>	<input type="checkbox"/>	\$
Trust / Partnership	<input type="checkbox"/>	<input type="checkbox"/>	\$
Non-residential trust transfer <i>Property, service, etc...</i>	<input type="checkbox"/>	<input type="checkbox"/>	\$
Government allowances <i>Newstart, Youth Allowance, etc...</i>	<input type="checkbox"/>	<input type="checkbox"/>	\$
Government pensions	<input type="checkbox"/>	<input type="checkbox"/>	\$
Non-Government pensions	<input type="checkbox"/>	<input type="checkbox"/>	\$
Bonuses <i>Life insurance, Friendly society policy, etc...</i>	<input type="checkbox"/>	<input type="checkbox"/>	\$
Business loss / income (NET)	<input type="checkbox"/>	<input type="checkbox"/>	\$
Business loss (Deferred)	<input type="checkbox"/>	<input type="checkbox"/>	\$
Foreign entity interest <i>Direct, Indirect, etc...</i>	<input type="checkbox"/>	<input type="checkbox"/>	\$
Foreign source income <i>Pensions, assets, property, etc...</i>	<input type="checkbox"/>	<input type="checkbox"/>	\$
Foreign investment interest <i>Foreign life assurance policy, Foreign investment fund, etc...</i>	<input type="checkbox"/>	<input type="checkbox"/>	\$
			\$
			\$
			\$
			\$

Income
This column

\$

DEDUCTIONS	NO	YES	Amount
Work-related car expenses			
Cents Per kilometer	<input type="checkbox"/>	<input type="checkbox"/>	\$
Log book	<input type="checkbox"/>	<input type="checkbox"/>	\$
1/3 of actual expense	<input type="checkbox"/>	<input type="checkbox"/>	\$
12% of actual cost	<input type="checkbox"/>	<input type="checkbox"/>	\$
Other work related travel expenses			
Domestic travel	<input type="checkbox"/>	<input type="checkbox"/>	\$
Domestic travel	<input type="checkbox"/>	<input type="checkbox"/>	\$
Overseas travel	<input type="checkbox"/>	<input type="checkbox"/>	\$
			\$
			\$
Work related uniform and clothing expenses			
Protective clothing	<input type="checkbox"/>	<input type="checkbox"/>	\$
Occupation specific clothing	<input type="checkbox"/>	<input type="checkbox"/>	\$
Non-Compulsory uniform	<input type="checkbox"/>	<input type="checkbox"/>	\$
Compulsory uniform	<input type="checkbox"/>	<input type="checkbox"/>	\$
Laundry	<input type="checkbox"/>	<input type="checkbox"/>	\$
Dry cleaning	<input type="checkbox"/>	<input type="checkbox"/>	\$
			\$
			\$
			\$
Work related self education			
Books	<input type="checkbox"/>	<input type="checkbox"/>	\$
Course(s) fees	<input type="checkbox"/>	<input type="checkbox"/>	\$
Travel	<input type="checkbox"/>	<input type="checkbox"/>	\$
			\$
			\$
			\$
			\$

Deductions
This column

\$

DEDUCTIONS NO YES Amount

Other expenses

Home office	<input type="checkbox"/>	<input type="checkbox"/>	\$
Computer software	<input type="checkbox"/>	<input type="checkbox"/>	\$
Telephone / Mobile phone	<input type="checkbox"/>	<input type="checkbox"/>	\$
Tools & equipment (over \$300)	<input type="checkbox"/>	<input type="checkbox"/>	\$
Tools & equipment (under \$300)	<input type="checkbox"/>	<input type="checkbox"/>	\$
Subscriptions & Union fees	<input type="checkbox"/>	<input type="checkbox"/>	\$
Journals / Periodicals	<input type="checkbox"/>	<input type="checkbox"/>	\$
Depreciation	<input type="checkbox"/>	<input type="checkbox"/>	\$
			\$
			\$
			\$

Miscellaneous deduction types

Interest & dividend deductions	<input type="checkbox"/>	<input type="checkbox"/>	\$
Gifts & donations	<input type="checkbox"/>	<input type="checkbox"/>	\$
Australian pension (UPP)	<input type="checkbox"/>	<input type="checkbox"/>	\$
Foreign pension (UPP)	<input type="checkbox"/>	<input type="checkbox"/>	\$
Tax affairs management costs	<input type="checkbox"/>	<input type="checkbox"/>	\$
Tax losses of earlier years	<input type="checkbox"/>	<input type="checkbox"/>	\$
Australian film industry incentive	<input type="checkbox"/>	<input type="checkbox"/>	\$
Non-employer superannuation	<input type="checkbox"/>	<input type="checkbox"/>	\$
			\$
			\$
			\$

Other deductions

			\$
			\$
			\$
			\$
			\$
			\$
			\$
			\$

Deductions
This column \$

DEDUCTIONS NO YES Amount

Superannuation

Fund Name

Policy #

..... \$

..... \$

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Tax offset rebates

Do you have a child that was born on or after July 1 2001? NO YES

Spouse (without dependants) NO YES \$

Child housekeeper NO YES \$

Housekeeper NO YES \$

Senior Australian NO YES \$

Superannuation pension / ETP NO YES \$

30% private health insurance NO YES \$

Superannuation contributions on behalf of spouse NO YES \$

Zone rebate NO YES \$

20% tax offset on medical expenses over \$1,250 (NET) NO YES \$

Parent / invalid relative NO YES \$

Landcare & water rebate NO YES \$

Low income NO YES \$

Family Tax Benefit Part A NO YES \$

Family Tax Benefit Part B NO YES \$

Child Care Offset NO YES \$

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Deductions
This column \$

Signature

Date