

**INCOME TAX CHECKLIST****INCOME – (All evidence must be kept for 5 years)**

- Centrelink Benefits/ Allowances Yes/No
- Salary & Wages (Payment Summaries) Yes/No
- Eligible Termination Payments Yes/No
- Other Australian Pensions or Annuities Yes/No
- Interest Yes /No
- Income from partnerships and/ or Managed investments Yes/No
- Capital Gains Yes/No
- Foreign Source Income Yes/No
- Rental Income & Expenses Yes/No
- Dividends Yes/No
- Other Income (Specify)

WORK RELATED DEDUCTIONS

- Donations - \$.....

Work Related Car Expenses (Diary/ Logbook must be kept)Logbook Method (provide logbook & expenses) **OR** Cents Per Km Method – Kms

Rego..... Make Model.....

Compulsory Uniform / Protective Clothing Expenses

- Replacements Yes/ No \$.....
- Laundry Yes/ No \$.....
- Dry Cleaning Yes/ No \$.....
- Sun Protection Yes/ No \$.....

Self- education – Taken at Educational Institution - (Must be work related)

- Course Name: Course Fees: \$.....

Other Work – Related Deductions

- Seminars / Conferences Yes/ No \$.....
- Home Office Expenses (4- Week Diary Required) Yes/ No \$.....
- Computer Consumables Yes/ No \$.....
- Phone / Mobile Phone (4- week usage diary & itemised account) Yes/ No \$.....
- Internet (4- week usage diary & itemised account) Yes/ No \$.....
- Work Related Travel & Accommodation Yes/ No \$.....
- Subscriptions, Union Fees & Journals Yes/ No \$.....
- Tools & Equipment – UNDER \$300 each Yes/ No \$.....
- Tools & Equipment – OVER \$300 each, require: Yes/ No \$.....
 - Date of purchase
 - Item Name
- Any Other Work-Related Deductions (Specify)

OTHER DEDUCTIONS/REBATES – Supply Documentation

- Personal Super Contributions (ensure notice of intent to claim has been lodged with superfund) Yes/ No
- Private health insurance Yes/ No
- Income Protections Insurance (not in super) Yes/ No \$.....

FEES ARE PAYABLE AT THE TIME OF THE APPOINTMENT. Do you Require fees to be deducted from your refund? (additional \$22 fee)

Account Name BSB A/C No

Signature-

