

## 2016 individual income tax return checklist

<b>Full Name</b>	
<b>Tax File Number</b>	
<b>Date of birth</b>	
<b>ABN (if applicable)</b>	
<b>Address</b>	
<b>Address (postal)</b> <small>(Put 'as above' if the same)</small>	
<b>Telephone contacts</b>	<b>Mobile:</b>
	<b>Business Hours (work) :</b>
	<b>After Hours (home):</b>
<b>Email</b>	
<b>Electronic banking Details</b> <small>(for refund if applicable)</small>	<b>BSB:</b>
	<b>Account Number:</b>
	<b>Account Name:</b>
<b>Main occupation</b>	
<b>Spouse name and TFN</b>	
<b>Name and DOB of Dependant Children</b>	

*Please circle YES or NO for each of the items listed*

*Income tax return checklist continued*

**INCOME – Please provide evidence**

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 Newstart, youth allowance 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
- .....

*Income tax return checklist continued*

## **DEDUCTIONS – Please provide evidence**

### **D1. Work related car expenses**

- cents per kilometre method (up to a maximum of 5,000 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) ..... YES/NO  
*(please specify)*

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### **D3. Work related uniform and other clothing 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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**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
- depreciation ..... YES/NO
- travel ..... YES/NO
- other (please specify) ..... YES/NO
- .....

**D5. Other work related expenses**

- Home office expenses ..... 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
- .....

**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
- 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: .....
- Do you pass the 10% test? ..... YES/NO  
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  
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- 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 2016? ..... YES/NO  
T5. Did you have net medical expenses in 2016? ..... YES/NO  
If so, do these medical expenses include expenses relating to disability aids, attendant care or aged care expenses? ..... YES/NO  
T6. Did you maintain a dependant who is unable to work due to invalidity or carer obligations? ..... YES/NO  
T7. Are you entitled to claim the landcare and water facility tax offset? ..... YES/NO  
T8. Other non-refundable tax offsets (please specify)..... YES/NO  
T9. Other refundable tax offsets (please specify) ..... YES/NO  
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**Income tax return checklist continued**

## Other relevant information

A. Are you entitled to the Medicare levy exemption or reduction in 2016? ..... YES/NO  
(If yes, please specify):

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B. Did you have private health insurance in 2016? ..... YES/NO  
(If yes, please provide the annual statement received from your health fund)

C. Were you under the age of 18 on 30 June 2016?..... YES/NO

D. Did you become an Australian tax resident at any time during the 2016 income year? ..... YES/NO

E. Did you cease to be an Australian tax resident at any time during the 2016 income year?... YES/NO

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

G. Do you have a HECS/HELP liability or a student financial supplement loan debt? ..... YES/NO

I. Did a trust or company distribute income to you in respect of which Family Trust Distribution Tax (FTDT) 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) – (reviewer consider if deemed dividend in year under Division 7A):

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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 2016? ..... YES/NO

– Did you or your spouse receive FTB through the Department of Human Services in 2016? YES/NO

M. Income tests information

– Do you have any total reportable fringe benefits amounts in 2016?..... YES/NO

– Do you have any reportable employer superannuation contributions in 2016?..... YES/NO

– Did you receive any tax-free government pensions in 2016?.....YES/NO

– Did you receive any target foreign income in 2016?.....YES/NO

– Did you have a net financial investment loss in 2016? ..... YES/NO

– Did you have a net rental property loss in 2016?..... YES/NO

– Did you pay child support in 2016?.....YES/NO

– Number of dependent children? \_\_\_\_\_

**Income tax return checklist continued**

N. Spouse details (if applicable)

- Did you have a spouse for the full year from 1 July 2015 to 30 June 2016? .....YES/NO
  - If you had a spouse for only part of the income year, please specify the dates between 1 July 2015 to 30 June 2016 when you had a spouse:  
From \_\_\_\_ / \_\_\_\_ / \_\_\_\_\_ to \_\_\_\_ / \_\_\_\_ / \_\_\_\_\_
- What was your spouse's taxable income for the 2016 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 2016 income year? ..... YES/NO
- Did your spouse have any reportable fringe benefits amounts for the 2016 income year? ..... YES/NO
- Did your spouse receive any Australian Government pensions or allowances (not including exempt pension income) in the 2016 income year? ..... YES/NO
- Did your spouse receive any exempt pension income in the 2016 income year? ..... YES/NO
- Does your spouse have any reportable super contributions for the 2016 income year?... 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' in the 2016 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 2016 income year? ..... YES/NO
- Did your spouse pay child support during the 2016 income year? ..... YES/NO
- If your spouse is 55 to 59 years old, did they receive a superannuation lump sum (other than a death benefit) during the 2016 income year that included a taxed element that does not exceed their low rate cap? ..... YES/NO

Dated the ..... day of .....20.....

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**Signature of taxpayer**

.....  
**Name (print)**

