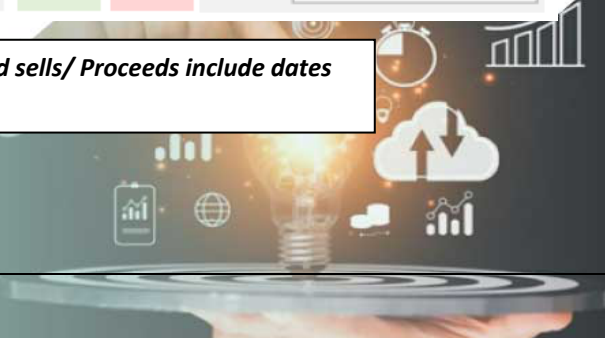


TAX RETURN CHECKLIST (Individual Non-Business)

Full Name			
Postal address			
Date of birth		Tax file number	
Contact number		Email address	
Bank details	BSB	Account	
How many employers did you have during the year?	0 ☐ 1 ☐ 2 ☐ 3 ☐ 4+ ☐		
What was your main occupation title during the year?			
	YES	NO	
Did you receive any Government payments ? <i>E.g. Newstart Allowance/JobSeeker, Austudy, Age Pension, etc.</i>	☐	☐	
Did you receive a distribution from a partnership or trust?	☐	☐	
Did you receive any investment income ?	☐	☐	
☐ Share dividends	☐		
☐ Bank interest / term deposit	☐		
☐ Managed funds	☐		
☐ Investment property	☐		
Did you sell any investment assets during the financial year?	☐	☐	If yes, please provide documents.
Did you have a spouse (married or defacto)?	☐	☐	
☐ Spouse's name			
☐ Spouse's date of birth			
☐ Spouse's taxable income			
Did you have any dependent children living with you? <i>*Note: Children up to 21 years of age + full-time students under 25</i>	☐	☐	How many:
Did you have private health insurance ?	☐	☐	Provider:
Did you make any post-tax contributions to super ? <i>*Note: Does not include salary sacrifice</i>	☐	☐	Amount:

Crypto Currency – Please provide source notes on cost and sells/ Proceeds include dates



TAX RETURN CHECKLIST (Individual Non-Business)

Did you use your **vehicle** for work travel during the year?

☐ ☐

o Vehicle registration number

o Vehicle make and model

Cents per kilometre method – this method is applicable if you **have not kept a logbook** but use your car for work.
**Note: the maximum the Taxation Office allows you to claim is 5,000 kilometres.*

o Total work kilometres travelled for the year

Logbook method – the logbook must cover at least 12 continuous weeks and detail odometer readings, dates/times, kilometres travelled and the purpose of each journey.

o Total fuel expenses

o Total registration expense

o Total insurance expense

o Total repairs and maintenance

o Any finance/lease payments for the vehicle?

☐ ☐

If yes, please provide documents.

Did you incur any work-related **travel expenses**?

☐ ☐

Types of expenses may include public transport, air travel, taxi fares, ride-share fees, road tolls, parking fees, short-term care hire, meals, incidental expenses, accommodation, etc.

o Expense type and total

o Expense type and total

o Expense type and total

o Reason/s for travel

Reasons for travel may include carrying bulky tools or equipment that you cannot leave at work, attend conferences or meetings, deliver items, or collect supplies, perform itinerant work, etc.

Did you incur any work-related **uniform, clothing, laundry, protective equipment expenses**?

☐ ☐

Uniform that is either compulsory or non-compulsory that is unique and distinctive to the organisation for whom you work. You can claim the costs of washing, drying, and ironing eligible work clothes, or having them dry-cleaned. You must have written evidence, such as diary entries and receipts, for your laundry expenses if the amount of your claim is greater than \$150.

o Expense type and total

o Expense type and total

o Expense type and total



TAX RETURN CHECKLIST (Individual Non-Business)

	YES	NO
Did you have any self-education expenses relating to your job?	☐	☐

Self-education expenses are deductible when the course you undertake leads to formal qualification. The course must have sufficient connection to your current work activities as an employee and: maintain or improve the specific skills or knowledge you require in your current work activities; and result in, or is likely to result in an increase in your income.

- o Expense type and total
- o Expense type and total
- o Expense type and total

Did you use your home internet for work-related purposes?	☐	☐
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If you used your own internet for work purposes, you may be able to claim a deduction if you spent the money yourself; the expense was directly related to earning your income, and you have a record to prove it. You cannot claim a deduction where you have not incurred any expenses, or you were reimbursed for any costs by your employer.

- o What was your average monthly home internet costs?
- o What percentage of your home internet usage would you estimate to have been work-related?

Did you use your mobile phone for work-related purposes?	☐	☐
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If you used your own mobile phone for work purposes, you may be able to claim a deduction if you spent the money yourself; the expense was directly related to earning your income, and you have a record to prove it. You cannot claim a deduction where you have not incurred any expenses, or you were reimbursed for any costs by your employer.

- o What was your average monthly mobile phone bill?
- o What percentage of your mobile phone usage would you estimate to have been work-related?

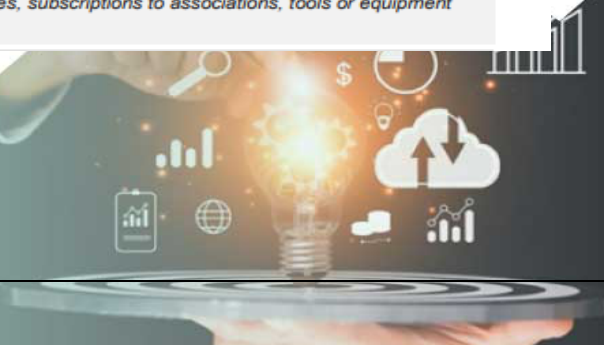
Did you use your home office for work-related purposes?	☐	☐
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To claim home office, you need to have a dedicated work area, such as a home office where you perform any work from home. You must also have kept records of either; your actual hours spent working at home for the year, or a diary for a representative four-week period to show your usual pattern of working at home.

- o How many hours per week did you work from home, on average?

Did you have any other work-related expenses ?	☐	☐
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Expenses may include books, periodicals, digital information, protective glasses, cosmetics containing sun protection, overtime meals, seminars, conferences, education workshops, union fees, subscriptions to associations, tools or equipment costing less than \$300, stationery, briefcases, satchels, etc.



TAX RETURN CHECKLIST (Individual Non-Business)

o Expense type and total	
o Expense type and total	
o Expense type and total	
o Expense type and total	

Provide the date the expense was paid in the above table. Provide the work -related usage as a Percentage %.

Did you make any **donations** of \$2 or more?

☐ ☐

Donations made to a GoFundMe personal campaigns are generally considered to be personal gifts and are not guaranteed to be tax-deductible. Only donations made to a GoFundMe certified charity campaigns are guaranteed to be tax-deductible.

o Recipient and total	
o Recipient and total	
o Recipient and total	

Did you pay any **child support** during the year?

☐ ☐

o Total amount paid	
---------------------	--

Did you pay any **income protection insurance** premiums?

Note: Does **not include policies covered within your super fund*

☐ ☐

o Total amount paid	
---------------------	--

Did you pay any **tax agent/accounting fees** during the year?

☐ ☐

o Total amount paid	
---------------------	--

Do you have any notes or comments for your accountant?

☐ ☐

TAX RETURN CHECKLIST (Individual Non-Business)

Foreign source of income must be reported to the ATO. If lodging tax returns overseas our office will require copies of the lodged overseas returns.

Any other Questions?

We ask that all information & other source documentation required to complete your return are emailed in one email to attend to your return in a timely manner. Once all is compiled & the checklist completed, email the completed form & attachments to george@siganos.com.au

