

Siganos Sydney Accountants

Chartered Accountants & Tax Agents Sydney NSW PH 9570 6977
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INDIVIDUAL TAX RETURN CHECKLIST

TAX YEAR (FY): _____

1. PERSONAL DETAILS

Full Name		
Postal Address		
Date of Birth		Tax File Number
Contact Number		Email Address
Bank Details Where ATO Refunds deposited or payment plans direct debited.	BSB: Account:	

How many employers did you have during the year?	[]
Main occupation title during the year	

Are you an Australian Resident for Tax Purposes?	☐ Yes	☐ No
If No, provide Visa Type		
If worked less than a full year, provide dates (from / to)		
** We will require a Medicare Levy Exemption Certificate if you hold a Visa & do not have access to Medicare benefits. Apply: servicesaustralia.gov.au/medicare-entitlement-statement		
Are you on a working holiday visa? & keep a residence outside of Australia	☐ Yes	☐ No

2. INCOME OVERVIEW

	YES	No
Did you receive any Government payments ?	☐	☐
E.g. Newstart Allowance / JobSeeker, Austudy, Age Pension, etc.		
Did you receive a distribution from a partnership or trust?	☐	☐
Did you receive any investment income ?	☐	☐
● Share dividends		
● Bank interest / term deposit		

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• Managed funds		
• Investment property		
Did you sell any investment assets during the financial year?	[]	[] No
If yes, please provide purchase & sale documents.		

Spouse / Partner Details (if applicable)

Did you have a spouse (married or de facto)?	[] Yes	[] NO
• Spouse's name		
• Spouse's date of birth		
• Spouse's taxable income		

Did you have any dependent children living with you?	[] Yes	[] No
<i>*Note: Children up to 21 years of age + full-time students under 25</i>		
Did you have private health insurance ?	[] Yes	[] No
Did you have private health insurance ?	[] Yes	[] No
NOTE: MLS will apply if you both do not hold full private health cover		
Did you make any post-tax contributions to super ?	[] Yes	[] No
<i>*Note: Does not include salary sacrifice</i>		

3. MOTOR VEHICLE EXPENSES

Did you use your vehicle for work travel during the year?	[] Yes	[] No
• Vehicle registration number		
• 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. Does not include travel to work to one premises or work to home.*

• Total work kilometres travelled for the year	
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Logbook Method

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The logbook must cover at least 12 continuous weeks and detail odometer readings, dates/times, kilometres travelled and the purpose of each journey. . *Note: The maximum the Taxation Office allows you to claim is 5,000 kilometres. Does not include travel to work to one premises or work to home.

● Total fuel expenses	
● Total registration expense	
● Total insurance expense	
● Total repairs and maintenance	
Any finance / lease payments for the vehicle?	☐ Yes ☐ No
If yes, please provide documents.	

4. WORK-RELATED TRAVEL EXPENSES

Did you incur any work-related travel expenses ?	☐ Yes	☐ No
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.		
● Expense type and total		
● Expense type and total		
● Expense type and total		
● Reason/s for travel		
Reasons for travel may include carrying bulky tools or equipment, attending conferences or meetings, delivering items, collecting supplies, performing itinerant work, etc.		

5. UNIFORM, CLOTHING & PROTECTIVE EQUIPMENT EXPENSES

Did you incur any work-related uniform, clothing, laundry, protective equipment expenses?	☐ Yes	☐ No
Uniform that is either compulsory or non-compulsory and unique to the organisation. You can claim washing, drying, and ironing eligible work clothes. You must have written evidence such as diary entries and receipts for laundry expenses if the claim is greater than \$150. *Only provide items where you hold receipts.		
● Expense type and total		
● Expense type and total		
● Expense type and total		

6. SELF-EDUCATION EXPENSES

Did you have any self-education expenses relating to your job?	☐ Yes	☐ No
<i>Self-education expenses are deductible when the course leads to formal qualification with sufficient connection to your current work activities — to maintain or improve specific skills or knowledge you require, and result in (or are likely to result in) an increase in your income.</i>		
Expense type and total		
Expense type and total		
Expense type and total		

7. HOME INTERNET & MOBILE PHONE EXPENSES

Did you use your home internet for work-related purposes?	☐ Yes	☐ No
<i>If you used your own internet for work purposes, you may be able to claim a deduction if 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 were reimbursed by your employer.</i>		
Average monthly home internet cost (\$)		
Estimated work-related % of home internet usage		

Did you use your mobile phone for work-related purposes?	☐	☐ No
<i>If you used your own mobile phone for work purposes, you may be able to claim a deduction if 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 were reimbursed by your employer.</i>		
Average monthly mobile phone bill (\$)		
Estimated work-related % of mobile phone usage		

8. HOME OFFICE EXPENSES

Did you use your home office for work-related purposes?	☐	☐ No
<i>To claim home office, you need to have a dedicated work area. 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.</i>		
Average hours per week worked from home		

9. OTHER WORK-RELATED EXPENSES

Did you have any other work-related expenses ?	☐ Yes	☐ No
<i>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 \$300.00, stationery, briefcases, satchels, etc.</i>		
<i>For all other work-related expenses costing more than \$300.00, provide an item listing that includes the date of purchase, along with the completed checklist. You may email across a list if the space below is insufficient.</i>		
● Expense type and total		
● Expense type and total		
● Expense type and total		

10. OTHER INCOME

Foreign Income — if you have received foreign income, you must provide your recent lodged tax returns from the overseas country, along with the foreign tax paid.

Funds & Cryptocurrency — We will require the tax statements / summaries from your funds & cryptocurrency platforms. These tax statements may attract additional costs (which are tax deductible on any profit generated). For all Cryptocurrency activity we recommend Koinly (koinly.io) as these Crypto tax summaries are compliant with Australian Tax laws & supported by over 20 countries.

● Foreign income — country and amount	
● Foreign tax paid (\$)	
● Crypto / digital assets — platform and summary attached?	
● Funds / managed investment tax statement attached?	

11. DONATIONS & OTHER DEDUCTIONS

	YES	NO
Did you make any donations of \$2 or more?	☐	☐
<i>Donations made to a GoFundMe personal campaign are generally considered personal gifts and are not guaranteed to be tax-deductible. Only donations made to a GoFundMe certified charity campaign are guaranteed to be tax-deductible.</i>		
● Recipient and total		

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• Recipient and total Donations Cont'd	
• Recipient and total	

Did you pay any child support during the year?	☐ Yes	☐ No
Did you pay any income protection insurance premiums?	☐ Yes	☐ No
<i>*Note: Does not include policies covered within your super fund</i>		
Did you pay any tax agent / accounting fees during the year?	☐ Yes	☐ No

12. NOTES & COMMENTS FOR YOUR ACCOUNTANT

13. CLIENT DECLARATION

I declare that the information provided in this checklist is true, correct and complete. I understand that it is an offence to knowingly make a false or misleading statement to the ATO. I authorise Siganos & Co Pty Ltd to prepare and lodge my income tax return on my behalf.

Client Signature	Print Name	Date	
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