

2014 individual income tax return checklist

Full Name	
Tax File Number	New client only:
Date of birth	New client only:
ABN (if applicable)	
Address	
Address (postal) <small>(Put 'as above' if the same)</small>	
Telephone contacts	Mobile:
	Business Hours (work) :
	After Hours (home):
Email	
Bank account details	Name of account: BSB: Account number:

*Please circle **YES** or **NO** for each of the items listed below and provide relevant details (if known) were prompted.*

INCOME

- 1. PAYG Summaries (group certificates) YES/NO
- 2. Gross Interest YES/NO
- 3. Dividends YES/NO
- 4. Rental statements if applicable YES/NO

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, and all expenses, fuel, insurance, rego, repairs/services, tolls, etc..... 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

D3. Work related uniform and other clothing expenses

- Protective clothing purchases YES/NO
- Occupation specific clothing purchases 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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D4. Work related self-education expenses

Course taken at educational institution:

- Student union fees YES/NO
- course fees YES/NO
- books, stationery YES/NO
- depreciation YES/NO
- travel YES/NO
- other (please specify) YES/NO
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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

D9. Gifts or donations YES/NO

D10. Cost of managing tax affairs YES/NO

Other Expenses

Rental property expenses, ie repairs, agent fees, insurance, water, rates, loan interest, etc YES/NO

Tax offsets/rebates – Please provide evidence

T1. Do you have a dependent spouse born on or before 30 June 1952?.....YES/NO

T6. Did you have net medical expenses over \$2,120 in 2014?.....YES/NO

Other relevant information

Medicare levy and Medicare levy surcharge

M2. For the entire 2014 income year, were you and all of your dependants (including your spouse) covered by the appropriate private health insurance hospital cover? .. YES/NO

Private health insurance policy details

Do you have the details of your private health insurance policy details YES/NO

Please bring your health fund statement to your appointment

Spouse details – married or *de facto* (including same sex)

1. Did you have a spouse for the full year from 1 July 2013 to 30 June 2014?YES/NO
- If you had a spouse for only part of the income year, please specify the dates between 1 July 2013 to 30 June 2014 when you had a spouse:
From ____ / ____ / _____ to ____ / ____ / _____

3. What is your spouse’s name and date of birth? (If you had more than one spouse during 2014, provide the name of your spouse on 30 June 2014 or your last spouse)

Name:

DOB:

4. Did your spouse (named above) have taxable income for the 2014 income year? YES/NO
If yes, what was the amount? \$.....

7. Did your spouse have reportable fringe benefits amounts for the 2014 income year?.....YES/NO
If yes, what was the amount? \$.....

8. Did your spouse receive any Australian Government pensions or allowances (not including exempt pension income) in the 2014 income year?.....YES/NO
If yes, what was the amount? \$.....

9. Did your spouse receive any exempt pension income in the 2014 income year? YES/NO
If yes, what was the amount? \$.....

Other

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