

2020 TAX RETURN CHECKLIST

Individual (Non-Business)

Full name			
Postal address			
Date of birth		Tax file number	
Mobile 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 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>			
Did you have private health insurance ?			Provider:
Did you make any post-tax contributions to super ? <i>*Note: Does not include salary sacrifice.</i>			How much:
Did you sell any investment assets during the financial year?			If yes, provide details.

YES NO

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

- vehicle registration number:
- vehicle make and model:
- total work kilometres travelled for the year:

Where travel has exceeded 5,000kms, please include details of all vehicle expenses incurred and your business usage percentage (determined via the use of a logbook over a continuous period of 12 weeks).

- 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 **travel expenses**?

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

- expense type and total:
- expense type and total:
- expense type and total:

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

This is a uniform, 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.

- expense type and total:
- expense type and total:
- expense type and total:

Did you have any **self-education expenses** relating to your job?

Self-education expenses are deductible when the course you undertake leads to a formal qualification. The course must have a 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 from your current work activities.

- expense type and total:
- expense type and total:
- expense type and total:

YES NO

Did you use your **home internet** for work-related purposes?

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.

- What was your average monthly home internet cost?

- 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?

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.

- What was your average monthly mobile phone bill?

- What percentage of your mobile phone usage would you estimate to have been work-related?

Did you use your **home office** for work purposes?

To claim home office, you need to have a dedicated work area, such as a home office when 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.

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

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

Items 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 <\$300, stationery, briefcases, satchels, etc.

- expense type and total:

- expense type and total:

- expense type and total:

- expense type and total:

- expense type and total:

YES NO

Did you purchase any **tools, equipment, or other assets that cost more than \$300?**

If you bought tools, equipment, or other assets to help earn your income, you can claim a deduction for some or all of the cost. If you use the tools for both work and private purposes you will need to apportion the amount you claim. If you have a computer that you use for private purposes for half of the time, you can only deduct 50% of the cost.

- item description, date of purchase, purchase price, and work-related percentage:

- item description, date of purchase, purchase price, and work-related 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.

- recipient and total:

- recipient and total:

- recipient and total:

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

- total amount paid:

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

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

- total amount paid:

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

- total amount paid:

Do you have an outstanding **HELP / SFSS / TSL debt?**

- total amount due:

Do you have any notes or comments for your accountant?