

Individual (Non-Business)

## 2021 TAX RETURN CHECKLIST

<b>Full name</b>			
<b>Postal address</b>			
<b>Email address</b>			
<b>Tax file number</b>		<b>Date of birth</b>	
<b>Mobile phone</b>		<b>Work phone</b>	
<b>Bank details</b>	BSB		Account number

During the period 1 July 2020 to 30 June 2021:

How many <b>employers</b> did you have?	0	1	2	3	4	5+
Did you have a <b>spouse</b> (married or de facto)?	Yes	No				
Spouse's name:						
Spouse's date of birth:		Spouse's taxable income:	\$			
How many <b>dependent children</b> lived with you? <i>*Children up to 21 years of age and full-time students under 25</i>	0	1	2	3	4	5+
Did you have <b>private health insurance</b> ?	Yes	No	Health fund name:			
Did you <b>buy / trade / sell</b> any <b>cryptocurrency</b> ? <i>*Please provide annual cryptocurrency transaction listing.</i>	Yes	No				
Did you have any other <b>investment income</b> ? <i>*Please mark, as appropriate. *Please also provide details, as necessary.</i>	Yes	No	Share dividends Managed funds Bank interest Investment property Other			
Did you have <b>income protection insurance</b> ? <i>*Does not include policies covered within your super fund</i>	Yes	No				
Did you make any <b>post-tax contributions to super</b> ? <i>*Does not include salary sacrifice</i>	Yes	No				
Did you <b>sell any assets</b> during the financial year?	Yes	No	Type/s of disposed assets:			

Did you use your <b>vehicle</b> for work travel during the year?	Yes	No
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- 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 <b>travel expenses</b> ?	Yes	No
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*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 <b>uniform, clothing, laundry, protective equipment expenses</b> ?	Yes	No
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*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:
- expense type and total:

Did you have any <b>self-education expenses</b> relating to your job?	Yes	No
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*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:

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

Yes

No

*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?

Yes

No

*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?

Yes

No

*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?

Yes

No

*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:

- expense type and total:

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

Yes

No

*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?

Yes

No

*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?

Yes

No

- total amount paid:

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

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

Yes

No

- total amount paid:

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

Yes

No

- total amount paid:

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

Yes

No

- total amount due:

Do you have any notes or comments for your accountant?

Yes

No