

2023 Income Tax Return Checklist

Standard individual with salary and wages income

Full name			
Postal address			
Residential address			
Email address			
Mobile phone			
Tax file number		Date of birth	
Bank details	BSB	Account number	

During the period 1 July 2022 to 30 June 2023:

How many employers did you have?	0	1	2	3	4+
What was your main occupation title ?					

Did you earn any bank interest income?	Yes	No	Amount:
Did you earn any share dividend income?	Yes	No	
Did you earn any managed funds income?	Yes	No	
Did you buy, trade, or sell any cryptocurrency ?	Yes	No	
Did you have an investment property ?	Yes	No	
Did you sell any assets during the financial year?	Yes	No	Asset type:

How many dependent children lived with you? <small>*Children up to 21 years of age and full-time students under 25 years.</small>	0	1	2	3	4+
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Did you have private health insurance ?	Yes	No	Provider:	
What type of private health insurance coverage did you have?			Extras Only	Hospital Cover

Did you have a spouse (married or de facto)?	Yes	No
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Spouse's name:			
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Spouse's DOB:		Spouse's taxable income:	\$
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Did you use your vehicle for work travel during the year?	Yes	No
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You can't claim car expenses for travel between home and work or vice versa, even if you live a long way from your work. You also can't claim car expenses if you were reimbursed for them by your employer.

Vehicle make / model		Rego number	
Purchase price		Date purchased	

Choose Option A unless you possess a current logbook, in which case you may choose Option B.

A	Claiming the cents per kilometre method
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Total work kilometres travelled for the year:	*Max 5,000kms	kms
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B	Claiming the logbook method
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Do you have a current logbook ? <i>*Each logbook you keep is valid for 5 years, but you may start a new logbook at any time.</i>	Yes	No
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What date was your logbook completed?	
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What percentage of your vehicle's usage was for work purposes?	%
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Provide your **vehicle's expenses** for the year. Provide actual costs, not estimates.
**Provide whole amounts and we'll apportion them based on your work-related percentage.*

Registration	\$	Insurance	\$
Repairs and Maintenance	\$	Fuel and oil	\$
Interest	\$	Other	\$

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

Yes

No

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?

Yes

No

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:

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.

What is the total number of hours you worked from home in the year?

Did you keep a record of all the hours you worked from home?
**E.g., a timesheet, roster, diary, or similar document.*

Yes

No

Total home energy expenses (electricity and gas) paid for the year?

What percentage of your home's energy expenses were work-related?

%

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.

What was your average monthly home internet cost?

What percentage of your home internet usage was 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.

What was your average monthly mobile phone bill?

What percentage of your mobile phone usage was work-related?

%

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:

Did you purchase any **tools, equipment, etc. that cost over \$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 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

• recipient and total:

• recipient and total:

Did you pay any **tax agent / accounting fees**?

Yes

No

Amount

Did you make any **post-tax super contributions**?

**Does not include salary sacrifice.*

Yes

No

Amount

Did you submit a **notice of intent to claim a tax deduction** form to your super fund for the contributions you made?

Yes

No

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

**Excludes policies covered within your super fund.*

Yes

No

Amount

Did you pay any **child support**?

Yes

No

Amount

Do you have any **HELP / SFSS / TSL debt**?

Yes

No

Balance

Do you have any **notes or comments** for GTS?

**If you're a new client referred by someone, provide their name here.*