



MORE THAN TAX

Individual Tax Return Checklist - Basic

Your Details

Spouse Details

Full Name:

Phone/Mobile:

Email:

Address:

Occupation:

Do you have any dependent children? If so, how many?

Please provide bank details to receive tax refund via EFT

Name:

BSB:

Account Number:

More Than Tax - Individual Tax Return Checklist

Income

Tick if relevant

Your Details

Amount \$

Spouse Details

Amount \$

Supporting

Documents

Income Statements (*previously known as PAYG Summaries*)

Pensions or government payments

Employer Lump Sum & Termination Payment Summaries

Bank interest earned

Rental Properties

([click here](#) to our Rental Property Checklist)

Business Income (*Profit & Loss or access to software*)

Foreign Income

Capital Gain/Loss

(inc. crypto currency trades, gifts, swaps, fiat currency conversion and bills paid via crypto)

Employee Share Schemes

Dividend, Distribution & Managed Fund Income

Australia Superannuation Lump Sum Payment or Income Stream

COVID-19 Related Payments

Coronavirus Supplement

Consumer Travel Support Program (Rounds 1 & 2)

Pandemic Leave Disaster Payment

COVID-19 Disaster Payments

Creative Economy Support Package (Cash payments)

Other State, territory and local government assistance payments

(Note: We have access to all JobKeeper payments; hence supporting document is not necessary)

Deductions/Expenses*Tick if relevant***Your Details***Amount \$***Spouse Details***Amount \$***Supporting Documents**

Work related expenses:

Motor Vehicle

*(work to work travel only, please provide car model, rego and kms travelled; otherwise 12 consecutive weeks logbook must be kept)*Travel *(fares & accomodation)*

Compulsory Uniform with logo/Protective clothing

Self-education & professional development *(directly related to your occupation)*

Union, registrations, tools, subscriptions, memberships, seminars, conferences

Home Office Hours *(timesheet, roster or diary must be kept)**No. of hours per week from **1 Jul 2020 - 30 Jun 2021***Home Office Furniture *(office desk, chair, study lamp etc. Purchase date and amount required)*

Electricity & Gas, Cleaning, Home furnishings

(if you have a dedicated work area only. Actual work-from-home hours and 4-week diary must be kept)

Telephone & Internet

(monthly bills, work related % only. If claim is > \$50, 4-week diary or itemised bill must be kept)

Computer consumables, office equipment

*(work related % only. For purchases > \$300 please provide purchase date.)*COVID-19 related expenses *(e.g. hand sanitizers, face masks, gloves, anti-bacterial spray etc.)**(for taxpayers working in jobs that require close proximity with customers only)*

Any other costs incurred in earning income

Donations to charities or building funds

Income protection insurance *(under personal name only)*Personal Superannuation Contribution *(notice of intent to claim form required)*Prior year accounting fees *(for new clients only)*Do you have Private Health Insurance? *(Hospital or combined)**(If yes, please provide your private health insurance tax statement showing names of all persons covered in policy)*