



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

<i>Income</i>	<i>Tick if relevant</i>	Your Details <i>Amount \$</i>	Spouse Details <i>Amount \$</i>	Supporting Documents
Income Statements		_____	_____	_____
Pensions or government payments		_____	_____	_____
Employer Lump Sum & Termination Payment Summaries		_____	_____	_____
Bank interest earned		_____	_____	_____
Rental Properties <i>(click here to our Rental Property Checklist)</i>		_____	_____	_____
Business Income <i>(Profit & Loss or access to software)</i>		_____	_____	_____
Foreign Income		_____	_____	_____
Capital Gain/Loss <i>(inc. crypto currency trades, gifts, swaps, fiat currency conversion and bills paid via crypto)</i>		_____	_____	_____
Employee Share Schemes		_____	_____	_____
Dividend, Distribution & Managed Fund Income		_____	_____	_____
Australia Superannuation Lump Sum Payment or Income Stream		_____	_____	_____

<i>Deductions/Expenses</i>	<i>Tick if relevant</i>	Your Details <i>Amount \$</i>	Spouse Details <i>Amount \$</i>	Supporting Documents
Work related expenses:				
Motor Vehicle <i>(<u>work-to-work</u> travel only, please provide car model, rego and kms travelled; otherwise 12 consecutive weeks logbook must be kept and provided)</i>		_____	_____	_____
Parking <i>(<u>work-to-work</u> travel only)</i>		_____	_____	_____
Travel <i>(fares & accomodation)</i>		_____	_____	_____

Deductions/Expenses

Tick if relevant

Your Details

Amount \$

Spouse Details

Amount \$

Supporting

Documents

Work related expenses:

Compulsory Uniform with logo/Protective clothing

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

Union Fees and Professional Registration Fees

Subscription and Memberships

Seminars, webinars and conferences

Home Office Hours *(timesheet, roster or diary must be kept & provided)*

Home Office Furniture *(office desk, chair, study lamp etc. Purchase date and amount required)*

Electricity & Gas, Cleaning

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

Mobile Phone & Home Internet

(monthly bills, work related % only. 4-week diary or itemised bill must be kept)

Computer consumables

Tools & Equipment > \$300

Printing & Stationery

Any other costs incurred in earning income

Donations to charities or building funds

Income protection insurance *(under personal name only)*

Personal Superannuation Contribution

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 statements showing names of all persons covered in policy)