



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 <i>(previously known as PAYG Summaries)</i>				
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				
Employee Share Schemes				
Dividend, Distribution & Managed Fund Income				
Australia Superannuation Lump Sum Payment or Income Stream				

Deductions/Expenses

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 & accommodation)*

Compulsory Uniform with logo/Protective Clothing

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

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

<i>Deductions/Expenses (continued)</i>	<i>Tick if relevant</i>	Your Details <i>Amount \$</i>	Spouse Details <i>Amount \$</i>	Supporting Documents
Home Office Hours <i>(timesheet, roster or diary must be kept)</i>				
<i>No. of hours per week from 1 Jul 2019 - 29 Feb 2020</i>				
<i>No. of hours per week from 1 Mar 2020 - 30 Jun 2020</i>				
Home Office Furniture <i>(office desk, chair, study lamp etc. Purchase date and amount required)</i>				
Electricity & Gas, Cleaning, Home furnishings				
<i>(if you have a <u>dedicated work area</u> only. Actual work-from-home hours and 4-week diary must be kept)</i>				
Telephone & Internet				
<i>(monthly bills, work related % only. If claim is > \$50, 4-week diary or itemised bill must be kept)</i>				
Computer consumables, office equipment				
<i>(work related % only. For purchases > \$300 please provide purchase date. Please separate purchases made before and after 29 Feb 2020)</i>				
COVID-19 related expenses <i>(e.g. hand sanitizers, face masks, gloves, anti-bacterial spray etc.)</i>				
<i>(for taxpayers working in jobs that require close proximity with customers only)</i>				
Any other costs incurred in earning income				
Donations to charities or building funds				
Income protection insurance <i>(under personal name only)</i>				
Personal Superannuation Contribution <i>(notice of intent to claim form required)</i>				
Prior year accounting fees <i>(for new clients only)</i>				
Do you have Private Health Insurance? <i>(Hospital or combined)</i>		<i>(If yes, please provide your private health insurance statement)</i>		