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Income Tax Return Reference	Section of the Income Tax Return	Yes	No	Amount \$\$
Income				
1	Salary or wage Did you earn any Salary or Wages as an employee? (If so obtain and attach any employer payment summaries.)	<input type="checkbox"/>	<input type="checkbox"/>	
2.	Employment termination payments (ETPs) Was your employment terminated and you received a termination payment during the year? (If so obtain and attach any ETP payment summaries and employer termination statements.)	<input type="checkbox"/>	<input type="checkbox"/>	
3.	Australian Government allowances and payments like Newstart, youth allowance and Austudy payment Did you receive any of these payments? Provide details of all youth allowances, Newstart, sickness allowance or special benefit, or other educational or training allowances. (Note : client not sent a paper copy anymore)	<input type="checkbox"/>	<input type="checkbox"/>	
4.	Australian Government pensions and other allowances Did you receive any of these payments? Provide details of all Age Pension, Carer Payment, Single Parent Payment or other allowances. (Note : client not sent a paper copy anymore)	<input type="checkbox"/>	<input type="checkbox"/>	
5.	Australian annuities and superannuation income streams Did you receive any superannuation income streams? Obtain details of taxable and rebatable components of pension.	<input type="checkbox"/>	<input type="checkbox"/>	
6.	Australian superannuation lump sum payments Did you receive any superannuation lump sum payments? Superannuation lump sums paid from a taxed source to a person aged 60 or over are tax free. Lump sums paid to persons under 60 are still taxable. (Provide details of your age and amount of the lump sum payment)	<input type="checkbox"/>	<input type="checkbox"/>	



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7.	<p>Gross interest</p> <p>Did you receive any interest on your bank accounts?</p> <p>Please provided details of the amount received and whether any TFN withholding tax has been deducted.</p>	<input type="checkbox"/>	<input type="checkbox"/>	
8.	<p>Dividends</p> <p>Unfranked, partly franked and fully franked dividends are assessable for taxation purposes.</p> <p>Tax tip: where a reinvestment program has been entered into, the value of that dividend reinvestment is taxable. Carefully consider the taxation implications of bonus share issues to individuals. Also check for withholding tax deducted</p>	<input type="checkbox"/>	<input type="checkbox"/>	
Supplement Income or Loss				
9.	<p>Partnerships and trusts</p> <p>Did you receive any income from a partnership, trust or managed investment?</p> <p>Provide details of the partnership, trust or a managed fund tax statement for the financial year.</p>	<input type="checkbox"/>	<input type="checkbox"/>	
10.	<p>Net income or loss from business</p> <p>Did you receive any income from running a business?</p> <p>If so please complete our Business Items Checklist.</p>	<input type="checkbox"/>	<input type="checkbox"/>	
11.	<p>Capital gains</p> <p>Did you sell any assets during the year? (Real estate, shares, collectable items or business asset)</p> <p>Please provide details of a description of the asset, the purchase date, the purchase cost, the sale date and the sale proceeds amount.</p>	<input type="checkbox"/>	<input type="checkbox"/>	
12.	<p>Rent</p> <p>Did you receive any money from a rental property?</p> <p>If so please complete our rental property checklist.</p>	<input type="checkbox"/>	<input type="checkbox"/>	
Deductions				



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<p>13.</p>	<p>Work related car expenses</p> <p>Did you use your car for work during the year? (Did you use your car during work for work? Did you have to carry bulky tools or equipment to and from work? Did you start work at home then travel to work or vice versa?)</p> <p>If your travel is only to and from your workplace generally you would answer no to this question.</p> <p>If yes – Did you keep a log book? If so please provide the log book and the amounts you spent in total for fuel, registration, insurances, repairs & services.</p> <p>If you didn't keep a log book please provide details of the total kms travelled for work and how the amount was calculated.</p>	<p><input type="checkbox"/></p>	<p><input type="checkbox"/></p>	
<p>14.</p>	<p>Work related travel expenses</p> <p>Did you travel anywhere for work and pay for parking, tolls or accommodation? If so how much was it?</p>	<p><input type="checkbox"/></p>	<p><input type="checkbox"/></p>	
<p>15.</p>	<p>Work related uniform, occupation specific or protective clothing, laundry and dry cleaning expenses</p> <p>Did you purchase any uniform items or protective type clothing for work? If so how much was it?</p>	<p><input type="checkbox"/></p>	<p><input type="checkbox"/></p>	
<p>16.</p>	<p>Work related self-education expenses</p> <p>Did you do any courses related to work? If so how much was it?</p> <p>(Also detail and stationery or travel costs related to the course)</p>	<p><input type="checkbox"/></p>	<p><input type="checkbox"/></p>	
<p>17.</p>	<p>Other work related expenses</p> <p>Did you buy any books, pens, stationery, equipment, diary?</p> <p>Were you a part of a union? Did you need any licenses, subscriptions or memberships?</p> <p>If so provide the total amount spent for each category.</p> <p>Did you use your mobile phone, computer, internet for work? If so how much was it per month and what percentage was for work?</p>	<p><input type="checkbox"/></p>	<p><input type="checkbox"/></p>	



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18.	Gifts or donations Did you make any donations to charities? If so provide the total amount spent.	<input type="checkbox"/>	<input type="checkbox"/>	
19.	Cost of managing tax affairs Did you pay a tax agent to prepare your tax return last year? If so how much was it and how far did you have to travel to see them?	<input type="checkbox"/>	<input type="checkbox"/>	
20.	Other deductions Did you pay for any accident and sickness insurance premiums? If so how much was it?	<input type="checkbox"/>	<input type="checkbox"/>	
21.	Private health insurance Did you have private health insurance? If so provide the health insurer tax statement.	<input type="checkbox"/>	<input type="checkbox"/>	