

# INDIVIDUAL TAX RETURN CHECKLIST

Client Name \_\_\_\_\_ Client Signature \_\_\_\_\_

## INFORMATION FOR YOUR TAX RETURN

Name:		Spouse name:	
DOB:		Spouse DOB:	
Occupation:		Spouse Taxable Income:	
Residential address		Postal address	
		Email:	
Phone:	W:	H:	M:
Bank details:	Acc. name:	Acc. no:	BSB:
Children's details – name and DOB (if any):			

## PERSONAL INCOME TAX RETURN

Please supply all records with respect to the following:	Yes	No	N/A
PAYG payment summaries			
Government benefits (Centrelink etc)			
Investment income (dividend statements, interest statements, managed fund annual tax statements, rental property agent statements)			
Tax free government pension amount and any child support provided for the year if applicable			
Investment records – details of investment purchases and sales			
- Shares			
- Cryptocurrency			
- Other			
For those that are self employed, details of business income and expenses			

Please supply all records with respect to Motor vehicle details between 1 July to 30 June:	
Vehicle description and cost (please provide invoice if new)	
Number of work related km's travelled	
Registration and Insurance	
Fuel expenses	
Repairs and maintenance	
Business / work related use as per your logbook	
Other	

# RENTAL PROPERTY

Property details			
Address of rental property:			
Date property purchased:		Date property first earned rental income:	
Number of weeks available for rent:		Number of weeks private use:	
Ownership details:	<input type="checkbox"/> In your name	<input type="checkbox"/> In joint names	Name: Percentage
			Name: Percentage

Please supply all records with respect to rental property:	Yes	No	N/A
Agent Summary			
Advertising for tenants (if not on agent summary)			
Council rates (if not on agent summary)			
Depreciation Schedule / QS Report			
Insurance (if not on agent summary)			
Land Tax Assessment Notice			
Pest Control (if not on agent summary)			
Repairs & Maintenance (if not on agent summary) – please provide invoices			
Body Corporate Fees (if not on agent summary)			
Cleaning / Gardening (if not on agent summary)			
Interest Summary/ Loan Statements			
Stationery, telephone and postage (if not on agent summary)			
Water Charges (if not on agent summary)			
Other			

Depreciable items (if more than two items please attach a list)		
Item	Date purchased	Cost
		\$
		\$

Property Purchase / Improvements (if further space required please attach list)		
Item	Date	Cost
		\$
		\$

Additional Rental Items	Yes	No	N/A
Would you like Hall & Melia to provide a quote and organize a Depreciation Schedule / QS Report			
Would you like Hall & Melia to review your land tax status and potential land tax liability?			

For multiple properties please copy this schedule.

For new property purchases, please provide a copy of the purchase contract, settlement statement, details of costs of purchase including stamp duty and legal fees and details of borrowing expenses incurred.

# INDIVIDUAL TAX RETURN DEDUCTIONS CHECKLIST

When completing your tax return, you're entitled to claim deductions for some expenses that are directly related to earning your income. The expense must not be a private, domestic or capital expense. If the expense was both work-related and private or domestic, you can only claim a deduction for the work-related portion.

Please provide evidence in relation to the below if you would like to claim a deduction.

## POSSIBLE DEDUCTIONS YOU MAY CLAIM

<b>Please supply all records with respect to possible deductions:</b>	<b>Yes</b>	<b>No</b>	<b>N/A</b>
Work related domestic and overseas travel expenses			
Work uniform and protective clothing expenses			
Work related self-education expenses			
Work related clothing (occupation specific / protective / compulsory)			
Union / membership fees			
Sickness & Accident or Income Protection Insurance premiums			
Work related telephone expenses – Please provide total expenses and work related percentage of use (a diary of usage should be kept for a minimum of 4 weeks each year for substantiation requirements.) <b>Work Related %                      Total Cost</b>			
Work related internet expenses – Please provide total expenses and work related percentage of use (a diary of usage should be kept for a minimum of 4 weeks each year for substantiation requirements.) <b>Work Related %                      Total Cost</b>			
Please provide an estimate of your home office usage (hours per week) for the period 1st July 2022 to 30th June 2023 (a diary of usage should be kept for a minimum of 4 weeks each year for substantiation requirements.) <b>Hours Per Week</b>			
Have you made any gifts or donations? If yes, please provide a copy of the receipt that clearly shows the dollar amounts and recipients.			
<b>Have you made any personal super contributions? If so, please provide the acknowledge letter from super fund.</b>			
Other			

<b>Work Related Purchases (Laptop / Tablet / Mobile Phone etc.) – Please provide work related percentage of use (a diary of usage should be kept for a minimum of 4 weeks each year for substantiation requirements.)</b>		
Item	Date purchased	Cost
		\$
		\$
		\$

Thank you for completing the questionnaire.