



ACHIEVE
FINANCIAL GROUP

Accountants and Business Advisors

WEALTH | FREEDOM | INDEPENDENCE | SUCCESS

2019 individual income tax return checklist

Full Name	
Tax File Number	
Date of birth	
ABN (if applicable)	
Address	
Address (postal) (Put 'as above' if the same)	
Telephone contacts	Mobile:
	Business Hours (work) :
	After Hours (home):
Email	
MyGov Do you have a MyGov account if yes Assessment notices go straight to your MyGov Account	
Electronic banking Details (for refund if applicable)	BSB:
	Account Number:
	Account Name:
Main occupation	
Tax Return preference: Electronic copy or Paper copy?	If electronic please complete email address above

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NEWCASTLE | MAITLAND | DUNGOG

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Please circle YES or NO for each of the items listed Income tax return checklist continued

INCOME – Please provide evidence

1. Salary or wages YES/NO
2. Allowances, earnings, tips, director’s fees etc YES/NO
3. Employer lump sum payments YES/NO
4. Employment termination payments YES/NO
5. Australian Government allowances and payments like Newstart, youth allowance and Austudy payments YES/NO
6. Australian Government pensions and allowances YES/NO
7. Australian annuities and superannuation income streams YES/NO
8. Australian superannuation lump sum payments YES/NO
9. Attributed personal services income YES/NO
10. Gross Interest YES/NO
11. Dividends YES/NO
12. Employee share schemes YES/NO
13. Distributions from partnerships and/or trusts YES/NO
14. Personal services income (PSI) YES/NO
15. Net income or loss from business (as a sole trader) YES/NO
16. Deferred non-commercial business losses YES/NO
17. Net farm management deposits or repayments YES/NO
18. Capital gains YES/NO
- Did you sell the home that you lived in YES/NO
19. Foreign entities:
 - Direct or indirect interests in controlled foreign company YES/NO
 - Transfer of property or services to a non-resident trust YES/NO
20. Foreign source income (including foreign pensions) and foreign assets or property YES/NO
21. Rent YES/NO
22. Bonuses from life insurance companies or friendly societies YES/NO
23. Forestry managed investment scheme income YES/NO
- 24 Other income YES/NO
25. Did you earn income from Uber? YES/NO
26. Did you earn income from Air BNB? YES/NO

DEDUCTIONS – Please provide evidence

D1. Work related car expenses

- cents per kilometer method (up to a maximum of 5,000 kms) YES/NO
- **Do you own the car, make model and registration number of the vehicle**
- log book method YES/NO

D2. Work related travel expenses

- Employee domestic travel with reasonable allowance YES/NO
 - If the claim is more than the reasonable allowance rate, do you have receipts for your expenses? YES/NO
- Overseas travel with reasonable allowance YES/NO
 - Do you have receipts for accommodation expenses? YES/NO
 - If travel is for 6 or more nights in a row, do you have travel records? (e.g. a travel diary) .. YES/NO
- Employee without a reasonable travel allowance YES/NO
 - Did you incur and have receipts for airfares? YES/NO
 - Did you incur and have receipts for accommodation? YES/NO
 - Do you have receipts for hire cars (if applicable)? YES/NO
 - Did you incur and have receipts for meals and incidental expenses? YES/NO
 - Do you have any other travel expenses? YES/NO
- Other work-related travel expenses (e.g., a borrowed car) YES/NO
(please specify)
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.....

Have any of these expenses been reimbursed by your employer YES/NO

D3. Work related uniform and other clothing expenses

- Protective clothing YES/NO
- Occupation specific clothing YES/NO
- Non-compulsory uniform YES/NO
- Compulsory uniform YES/NO
- Conventional clothing YES/NO
- Laundry expenses (**Number of loads per week, are they mixed or single loads**) YES/NO
- Dry cleaning expenses YES/NO
- Other claims such as mending/repairs, etc (please specify) YES/NO

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Income tax return checklist continued

D4. Work related self-education expenses (not seminars)

Course taken at educational institution:

- union fees YES/NO
- course fees YES/NO
- books, stationery YES/NO
- depreciation YES/NO
- travel YES/NO
- other (please specify) YES/NO

(note you cannot claim expenses for study to get a better job, study must be directly related to your current job, ie to improve your skills)

D5. Other work-related expenses

- Home office expenses (how many hours per week & number of weeks worked)..... YES/NO
- Computer and software YES/NO
- Telephone/mobile phone YES/NO
- Tools and equipment YES/NO
- Subscriptions and union fees YES/NO
- Journals/periodicals YES/NO
- Depreciation YES/NO
- Sun protection products (i.e., sunscreen and sunglasses) YES/NO
- Seminars and courses not at an educational institution:
 - course fees YES/NO
 - travel YES/NO
 - other (please specify) YES/NO
- Any other work-related deductions (please specify) YES/NO

Other types of deductions

- D6. Low value pool deduction. YES/NO
- D7. Interest deductions YES/NO
- D8. Dividend deductions YES/NO
- D9. Donations to registered Charities (**payments to go fund me are not deductible**) YES/NO

D10 Cost of managing tax affairs

- Interest charged by the ATO (eg, including SIC and GIC)**
- Litigation costs – directly relating to your employment.....**
- Other expenses incurred in managing tax affairs**

Income tax return checklist continued

Other types of deductions (continued)

D11. Deductible amount of undeducted purchase price of a foreign pension or annuity YES/NO

D12. Personal superannuation contributions YES/NO

Note: **This excludes any superannuation paid by your employer**

Full name of fund: Account no:

Fund ABN: Fund TFN:

Have you provided the fund a notice of intention to deduct the contribution? YES/NO

Has this notice been acknowledged by the fund? YES/NO

D13. Deduction for project pool YES/NO

D14. Forestry managed investment scheme deduction YES/NO

D15. Other deductions (please specify) YES/NO

L1. Tax losses of earlier income years YES/NO

Tax offsets/rebates – Please provide evidence

T1. Are you a senior Australian or a pensioner? YES/NO

T2. Did you receive an Australian superannuation income stream? YES/NO

T3. Did you make superannuation contributions on behalf of your spouse? YES/NO

T4. Did you live in a remote area of Australia or serve overseas with the Australian defence force or the UN armed forces in 2019? YES/NO

T5. Did you have net medical expenses in 2019? YES/NO

If so, do these medical expenses include expenses relating to disability aids, attendant care or aged care expenses? YES/NO

Did the ATO allow you a claim for net medical expense in 2019? YES/NO

T6. Did you maintain a dependant who is unable to work due to invalidity or carer obligations? YES/NO

T7. Are you entitled to claim the Landcare and water facility tax offset? YES/NO

T8. Are you involved in an early stage venture capital limited partnership? YES/NO

T9. Are you an early stage investor in an early stage innovation company? YES/NO

T10. Other non-refundable tax offsets (please specify) YES/NO

T11. Other refundable tax offsets (please specify) YES/NO

Other relevant information

A. Are you entitled to the Medicare levy exemption or reduction in 2019? YES/NO
(If yes, please specify):

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B. Did you and your spouse/dependants have private health insurance in 2019? YES/NO
(If yes, please provide the annual statement received from your health fund)

C. Were you under the age of 18 on 30 June 2019? YES/NO

D. Did you become an Australian tax resident at any time during the 2019 income year? YES/NO

E. Did you cease to be an Australian tax resident at any time during the 2019 income year? ... YES/NO

F. Did you make a non-deductible (non-concessional) personal super contribution? YES/NO

G. Do you have a HECS/HELP liability or a student financial supplement loan debt, Student start up loan debt or trade support loan debt? YES/NO

H. are you a working holiday maker in Australia on a 417 or 462 (Working Holiday) Visa? YES/NO

I. Did a trust or company distribute income to you in respect of which Family Trust Distribution Tax (FTDT) was paid by the trust or company? YES/NO

J. Do you have a loan with a private company or have such a loan amount forgiven? YES/NO
(If yes, please specify) – (reviewer consider if deemed dividend in year under Division 7A):

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K. Did you receive any benefit from an employee share acquisition scheme? YES/NO

L. Family Tax Benefit ('FTB'):

– Did you have care of a dependent child in 2019? YES/NO

– Did you or your spouse receive FTB through the Department of Human Services in 2019? YES/NO

M. Income tests information

– Do you have any total reportable fringe benefits amounts in 2019? YES/NO

– Do you have any reportable employer superannuation contributions in 2019? YES/NO

– Did you receive any tax-free government pensions in 2019? YES/NO

– Did you receive any target foreign income in 2019? YES/NO

– Did you have a net financial investment loss in 2019? YES/NO

– Did you have a net rental property loss in 2019? YES/NO

– Did you pay child support in 2019? If so how much YES/NO

– Number of dependent children? Including children for which you pay child support _____

N. Spouse details (if applicable)

- Did you have a spouse for the full year from 1 July 2018 to 30 June 2019?YES/NO
 - If yes please provide your spouses full name
 - If you had a spouse for only part of the income year, please specify the dates between 1 July 2018 to 30 June 2019 when you had a spouse:
From ____ / ____ / _____ to ____ / ____ / _____
- What was your spouse's taxable income for the 2019 income year? \$.....
- Does your spouse have a share of trust income on which the trustee is assessed under Section 98 that has not been included in your spouse's taxable income YES/NO
- Did a trust or company distribute income to your spouse in respect of which family trust distribution tax was paid by the trust or company for the 2019 income year? YES/NO
- Did your spouse have any reportable fringe benefits amounts for the 2019 income year? YES/NO
- Did your spouse receive any Australian Government pensions or allowances (not including exempt pension income) in the 2019 income year? YES/NO
- Did your spouse receive any exempt pension income in the 2019 income year? YES/NO
- Does your spouse have any reportable super contributions for the 2019 income year? ... YES/NO
- Did your spouse receive any tax-free government pensions paid under the *Military Rehabilitation and Compensation Act 2004*? YES/NO
- Did your spouse receive any 'target foreign income' in the 2019 income year? YES/NO
- Did your spouse have a total net investment loss (i.e., the total of any financial investment loss and a rental property loss) for the 2019 income year?..... YES/NO
- Did your spouse pay child support during the 2019 income year? If yes how much? YES/NO

Dated the day of20.....

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Signature of taxpayer

.....
Name (print)