

2023 Individual Income Tax Return Checklist

Full Name	
Tax File Number ('TFN')	
Has your name changed since your last return?	Yes / No If Yes, previous name :
Date of birth ('DOB')	
Are you an Australian resident?	Yes / No / Unsure
ABN (if applicable)	
Address	
Address (postal) (Put 'as above' if the same)	
Telephone contacts	Mobile:
	Business Hours (work) :
	After Hours (home):
Email	
Electronic banking details (for refund if applicable)	BSB and Account Number:
	Account Name:
Main occupation	
Do you run your own business as a sole trader?	Yes / No
Do you run your own business in a company, trust or partnership?	Yes / No
Spouse details	Name:
	TFN and DOB:
Approximate income (if known)	

Please circle YES, NO or UNSURE for each of the items listed below:

INCOME - Please provide evidence (if applicable)

- Salary or wages YES/NO/UNSURE
- Allowances, earnings, tips, director's fees etc. YES/NO/UNSURE
- Employer lump sum payments YES/NO/UNSURE
- Employment termination payments YES/NO/UNSURE
- Australian Government allowances and payments like Youth Allowance, JobSeeker, and Austudy payments YES/NO/UNSURE
- Australian Government pensions and allowances YES/NO/UNSURE

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- 7. Australian annuities and superannuation income streams YES/NO/UNSURE
- 8. Australian superannuation lump sum payments YES/NO/UNSURE
- 9. Attributed personal services income YES/NO/UNSURE
- 10. Gross Interest YES/NO/UNSURE
- 11. Dividends YES/NO/UNSURE
- 12. Employee share schemes YES/NO/UNSURE
- 13. Distributions from partnerships and/or trusts YES/NO/UNSURE
- 14. Personal services income ('PSI') YES/NO/UNSURE
- 15. Net income or loss from business (as a sole trader) YES/NO/UNSURE
- 16. Deferred non-commercial business losses YES/NO/UNSURE
- 17. Net farm management deposits or repayments YES/NO/UNSURE
- 18. Capital gains YES/NO/UNSURE
- 19. Foreign entities:
 - Direct or indirect interests in controlled foreign company YES/NO/UNSURE
 - Transfer of property or services to a non-resident trust YES/NO/UNSURE
- 20. Foreign source income (including foreign pensions) and foreign assets or property YES/NO/UNSURE
- 21. Rent YES/NO/UNSURE
- 22. Bonuses from life insurance companies or friendly societies YES/NO/UNSURE
- 23. Forestry managed investment scheme income YES/NO/UNSURE
- 24. Other income (please specify below) YES/NO/UNSURE
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DEDUCTIONS – Please provide evidence (if applicable)

D1. Work-related car expenses

- Cents per kilometre method (up to a maximum of 5,000 business kms) YES/NO/UNSURE
- Log book method YES/NO/UNSURE
- Have any car expenses been reimbursed by your employer? YES/NO/UNSURE

D2. Work-related travel expenses

- Employee domestic travel with a reasonable travel allowance YES/NO/UNSURE
 - If the claim is more than the reasonable travel allowance rate, do you have receipts for your expenses? YES/NO/UNSURE
- Overseas travel with a reasonable travel allowance YES/NO/UNSURE
 - Do you have receipts for accommodation expenses? YES/NO/UNSURE
 - If travel is for 6 or more nights in a row, do you have travel records? (e.g., a travel diary)..... YES/NO/UNSURE
- Employee without a reasonable travel allowance YES/NO/UNSURE
 - Did you incur and have receipts for airfares? YES/NO/UNSURE
 - Did you incur and have receipts for accommodation? YES/NO/UNSURE

- Did you incur and have receipts for hire cars (if applicable)? YES/NO/UNSURE
- Did you incur and have receipts for meals and incidental expenses? YES/NO/UNSURE
- Do you have any other travel expenses? YES/NO/UNSURE
- Have any travel expenses been reimbursed by your employer? YES/NO/UNSURE
- Other work-related travel expenses (e.g., a borrowed car, public transport)
(please specify) YES/NO/UNSURE
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D3. Work-related clothing, laundry and dry cleaning expenses

- Protective clothing YES/NO/UNSURE
- Occupation specific clothing YES/NO/UNSURE
- Non-compulsory uniform YES/NO/UNSURE
- Compulsory uniform YES/NO/UNSURE
- Conventional clothing YES/NO/UNSURE
- Laundry expenses (up to \$150 without receipts) YES/NO/UNSURE
- Dry cleaning expenses YES/NO/UNSURE
- Other claims such as mending/repairs, etc (please specify) YES/NO/UNSURE
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Have any clothing, laundry and dry cleaning expenses been reimbursed by your employer? YES/NO/UNSURE

D4. Work-related self-education expenses

Course taken at educational institution:

- union fees YES/NO/UNSURE
- course fees YES/NO/UNSURE
- books, stationery YES/NO/UNSURE
- travel YES/NO/UNSURE
- other (please specify) YES/NO/UNSURE
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Have any self-education expenses been reimbursed by your employer? YES/NO/UNSURE

D5. Other work-related expenses

- Home office expenses (including working from home due to COVID-19) YES/NO/UNSURE
- Computer and software YES/NO/UNSURE
- Telephone/mobile phone YES/NO/UNSURE
- Tools and equipment YES/NO/UNSURE
- Subscriptions and union fees YES/NO/UNSURE
- Journals/periodicals YES/NO/UNSURE
- Depreciation YES/NO/UNSURE

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Sun protection products (e.g., sunscreen and sunglasses) YES/NO/UNSURE

Personal protective equipments (e.g., facemasks, sanitiser) YES/NO/UNSURE

COVID test (e.g., Rapid Antigen Test kits) YES/NO/UNSURE

Seminars and courses not at an educational institution:

- Course fees YES/NO/UNSURE
- Travel YES/NO/UNSURE
- Other (please specify) YES/NO/UNSURE

Any other work-related deductions (please specify) YES/NO/UNSURE

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Have any other work-related expenses been reimbursed by your employer? YES/NO/UNSURE

Other types of deductions

D6. Low value pool deduction YES/NO/UNSURE

D7. Interest deductions YES/NO/UNSURE

D8. Dividend deductions YES/NO/UNSURE

D9. Gifts or donations YES/NO/UNSURE

D10. Cost of managing tax affairs YES/NO/UNSURE

Interest charged by the ATO (e.g., Shortfall Interest Charge and General Interest Charge) YES/NO/UNSURE

Litigation costs YES/NO/UNSURE

Other expenses incurred in managing tax affairs YES/NO/UNSURE

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

D12. Personal superannuation contributions YES/NO/UNSURE

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/UNSURE

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

D13. Deduction for project pool YES/NO/UNSURE

D14. Forestry managed investment scheme deduction YES/NO/UNSURE

D15. Other deductions (please specify) YES/NO/UNSURE

Have any amounts at D6 to D15 been reimbursed by your employer YES/NO/UNSURE

L1. Tax losses of earlier income years YES/NO/UNSURE

Tax offsets/rebates – Please provide evidence (if applicable)

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

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

- T3. Did you make superannuation contributions on behalf of your spouse? YES/NO/UNSURE
- T4. Did you live in a remote area of Australia or serve overseas with the Australian defence force or the UN armed forces in the 2023 income year?..... YES/NO/UNSURE
- T5. Did you maintain a dependant who is unable to work due to invalidity or carer obligations in the 2023 income year?..... YES/NO/UNSURE
- T6. Are you entitled to claim the landcare and water facility tax offset? YES/NO/UNSURE
- T7. Are you involved in an early stage venture capital limited partnership? YES/NO/UNSURE
- T8. Are you an early stage investor in an 'early stage innovation company'?..... YES/NO/UNSURE
- T9. Are you entitled to any other refundable tax offsets (please specify)..... YES/NO/UNSURE

Other relevant information - Please provide evidence (if applicable)

- A. Are you entitled to the Medicare levy exemption or reduction in the 2023 income year? YES/NO/UNSURE

(If yes, please specify):
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- B. Did you and your spouse/dependants have private health insurance in the 2023 income year? YES/NO/UNSURE
(If yes, please provide the annual statement received from your Health Fund)

- C. Were you under the age of 18 on 30 June 2023? YES/NO/UNSURE

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

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

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

- G. Do you have a HELP liability, Student Financial Supplement Loan debt, Student Start-up Loan debt or Trade Support Loan debt? YES/NO/UNSURE

- H. Are you a working holiday maker in Australia on a 417 (working holiday) visa, a 462 (work and holiday) visa, or a 408 (COVID-19 pandemic event) visa?..... YES/NO/UNSURE

What is your 'home country' (where you are a national)?.....

Country name:.....

If you are a working holiday maker, do you believe you are an Australian tax resident for the 2023 income year? YES/NO/UNSURE

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

- J. Do you have a loan with a private company as at 30 June 2023 or has such a loan amount been forgiven in the 2023 income year? YES/NO/UNSURE

Has a Private company made a payment to you in the 2023 income year (other than a dividend)? YES/NO/UNSURE

(If yes, please specify)
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- K. Did you receive any benefit from an employee share acquisition scheme? YES/NO/UNSURE

- L. Family Tax Benefit ('FTB'):

- Did you have care of a dependent child in the 2023 income year? YES/NO/UNSURE

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- Did you or your spouse receive FTB through Services Australia in the 2023 income year? YES/NO/UNSURE

M. Income tests information

- Do you have any total reportable fringe benefits amounts in the 2023 income year? YES/NO/UNSURE
- Do you have any reportable employer superannuation contributions in the 2023 income year? YES/NO/UNSURE
- Did you receive any tax-free government pensions in the 2023 income year? YES/NO/UNSURE
- Did you receive any target foreign income in the 2023 income year? YES/NO/UNSURE
- Did you have a net financial investment loss in the 2023 income year? YES/NO/UNSURE
- Did you have a net rental property loss in the 2023 income year? YES/NO/UNSURE
- Did you pay child support in the 2023 income year? YES/NO/UNSURE
- Number of dependent children? _____

N. Spouse details (if applicable)

- Did you have a spouse for the full year from 1 July 2022 to 30 June 2023?YES/NO/UNSURE
- If you had a spouse for only part of the income year, please specify the dates between 1 July 2022 to 30 June 2023 when you had a spouse:
From ____ / ____ / _____ to ____ / ____ / _____
- Did your spouse die during the income year? YES/NO/UNSURE
- What was your spouse's taxable income for the 2023 income year (excluding any First Home Super Saver released amount)? \$._____.
- 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/UNSURE
- 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 2023 income year? YES/NO/UNSURE
- Did your spouse have any reportable fringe benefits amounts for the 2023 income year? YES/NO/UNSURE
- Did your spouse receive any Australian Government pensions or allowances (not including exempt pension income) in the 2023 income year? YES/NO/UNSURE
- Did your spouse receive any exempt pension income in the 2023 income year? YES/NO/UNSURE
- Does your spouse have any reportable employer super contributions or deductible personal superannuation contributions for the 2023 income year? YES/NO/UNSURE
- Did your spouse receive any tax-free government pensions paid under the *Military Rehabilitation and Compensation Act 2004*? YES/NO/UNSURE
- Did your spouse receive any 'target foreign income' in the 2023 income year? YES/NO/UNSURE
- 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 2023 income year? YES/NO/UNSURE
- Did your spouse pay child support during the 2023 income year? YES/NO/UNSURE
- If your spouse is aged between their preservation age and 59 years old, did they receive a superannuation lump sum (other than a death benefit) during the 2023 income year that included a taxed element that does not exceed their low rate cap? YES/NO/UNSURE

Signature of taxpayer

Name (print)

Dated the day of20.....