



## CHECKLIST – Year ended 30 June 2020

Client name .....TFN: .....

*(Please advise of any changes to your personal details)*

Address .....

Telephone No ..... Mobile No .....

Email address .....

Dependants? If yes, how many dependants? .....

**Full Name**

**Date of birth**

.....  
.....

### TO BE COMPLETED

### **Bank Details (Mandatory for tax refunds)**

Account Name: .....

BSB: ..... Account No: .....

Description	Details or supporting documents attached
<b>INCOME</b>	
PAYG Payment Summary Statements <i>(Occupation details if changed)</i>	
Interest received	
Dividends received	
Employee Share Schemes	
Trust Distributions received	
Rental Property Income & Expenses <i>(refer separate checklist if provided)</i>	
Superannuation lump sum payments or annuities	
Foreign Income received	
Sale of assets – eg. shares, property, trust units, <b>including main residence</b>	
Other income received	



Description	Details or supporting documents attached
<b>DEDUCTIONS</b>	
Work related car expenses, please provide a log book to substantiate your claim	
Work related travel expenses	
Work related uniform, laundry and protective clothing (only genuine protective clothing and monogrammed uniforms are claimable)	
Self-education expenses	
Income Protection Insurance, Sickness & Accident Insurance	
Donations	
Personal Superannuation Contributions – please provide acknowledgement that you intend to claim a deduction from your super fund.	
Home office expenses – did you work from home during COVID-19? Number of hours worked at home during pandemic.	
Other Home office expenses – hours worked at home.	
<b>Note:</b> Please provide % of private use for claims relating to Telephones, Computers, ipads etc.	
<b>TAX OFFSETS</b>	
Private Health Insurance Policy Statement	
Superannuation contributions for your spouse	
Other offsets	
<b>ADDITIONAL INFORMATION FOR YOUR INCOME TAX RETURN</b>	

Signature of taxpayer ..... Date .....