

CHECKLIST – Year ended 30 June 2021

Client nameTFN:

(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

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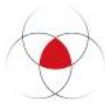
TO BE COMPLETED

Bank Details (Mandatory for tax refunds)

Account Name:

BSB: **Account No:**

Description	Details or supporting documents attached
INCOME	
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, cryptocurrency, property, including main residence , trust units	
Other income received	



Description	Details or supporting documents attached
DEDUCTIONS	
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.	
Note: Please provide % of private use for claims relating to Telephones, Computers, ipads etc.	
TAX OFFSETS	
Private Health Insurance Policy Statement	
Superannuation contributions for your spouse	
Other offsets	
ADDITIONAL INFORMATION FOR YOUR INCOME TAX RETURN	

Signature of taxpayer Date