TAX CHECKLIST - INDIVIDUAL

Client Name: ________________________________

Contact Details: _________________________________

This is a checklist of records required for your personal tax returns. If yes, please provide relevant information to complete your return.

Please upload your completed checklist and attachments to our client portal or via email, where possible.

Please confirm your Bank account details. BSB__________ Account No ___________________

Income Records	**YES**	**NO**	
			• Were you employed during the year? (Attach PAYG Summary)
			• Have your employment circumstances changed?
			• Have you received any termination payments during the year? (Attach ETP form)
			• Have you received any superannuation payouts during the year?
			• Are you registered with Centrelink for Family Tax Benefit?
			• Have you received any benefits from the Government? (Age Pension, Youth Allowance, Austudy, Parenting Payment).
			• Have you earned any interest from bank accounts or investments? •

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Income Records	YES	NO	
			• Have you bought or sold any shares during the financial year? If yes please attach purchase and sale documents.
			• Did you receive any dividends during the year? (Attach Dividend Slips).
			• Did you receive any shares from Employee share schemes? If yes, please provide annual ESS summary and detailed statement.
			• Did you earn any income from any other business or investments?
			• Did you receive distributions from a managed fund or trust? If yes, please provide annual taxation statement.
			• Did you receive any rent from investment properties? Please provide agent annual summary and details of any other expenses paid e.g. interest, rates etc.
			• Other Income matters to consider:
			• Did you earn any foreign source income? If yes, do you own assets outside Australia to the value of $50,000?
			• Do you have an interest in any property? (Attach cost details).
			• Did you buy or sell a property during the year?

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Deduction Records	YES	NO	
D1			• Did you travel for work in your car apart from home to work? If Yes - (Please give details of total business km's travelled).
D2			• Did you have other travel costs for work trips not reimbursed by your employer? (e.g. Bus/Taxi fares, parking, tolls).
D3			• Did you have to wear a uniform with logo or protective clothing? If Yes - (Circle the type of clothing 'UNIFORM' or 'PROTECTIVE')
D4			• Did you complete any educational courses related to your work?
D5			• Did you have any other work related expenses? (Attach relevant details): Tools Union Fees Reference Materials
			• Did you use a dedicated room in your residence for work? (Estimate hours per week; Floor area of room and entire house).
D7/D8			• Did you have expenses related to investment income? (Attach relevant details): Bank charges Interest expense
			• Did you make any donations to any charities during the year?
			• Did you have income protection insurance?
D12			• Did you make any personal superannuation contributions? Please provide a copy of your acknowledgement of Notice of Intention to Claim.

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Other Additional Records:	**YES**	**NO**	
S1			• Did you have a spouse during the year? (Attach their taxable income).
S2			• If yes, did you contribute super on behalf of your spouse?
PH			• Did you have Private health insurance? (Attach tax statement).
IT8			• Any changes to dependents during the financial year?
T5			• Did you incur any out of pocket medical expenses related to disability aids, attendant care or aged care after reimbursement from NDIS or private health insurer.
H1			• Higher Education Loan Programme (HELP) or Student Financial Supplement Scheme (SFSS) accumulated debt.
PR			• Prior year tax return (if 1st year with Enspira Financial or associated business in the group). TFN:__________________ DOB:_________________
			• Prior year tax agent fee (if 1st year with Enspira Financial or associated business in the group).