



TAX CHECKLIST - INDIVIDUAL

Client Name: _____

Contact Details: _____

This is a checklist of records required for your personal tax returns. 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	<u>YES</u>	<u>NO</u>	
			<ul style="list-style-type: none"> Were you employed during the year? If yes, then please note, we should be able to access the Income Statement (earlier called PAYG Summary) from the tax office when available or alternatively, you should be able to access it from your myGov account.
			<ul style="list-style-type: none"> Have your employment circumstances changed?
			<ul style="list-style-type: none"> Have you received any termination payments during the year? (Attach ETP form)
			<ul style="list-style-type: none"> Have you received any superannuation payouts during the year?
			<ul style="list-style-type: none"> Are you registered with Centrelink for Family Tax Benefit?
			<ul style="list-style-type: none"> Have you received any benefits from the Government? (Age Pension, Youth Allowance, Austudy, Parenting Payment).
			<ul style="list-style-type: none"> Have you earned any interest from bank accounts or investments?

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Income Records	<u>YES</u>	<u>NO</u>	
			<ul style="list-style-type: none"> Did you request release of an amount under First home super saver (FHSS)? If yes, please attach copy of a payment summary
			<ul style="list-style-type: none"> Have you bought or sold any shares during the financial year? If yes, please attach purchase and sale documents.
			<ul style="list-style-type: none"> Did you receive any dividends during the year? (Attach Dividend Slips)
			<ul style="list-style-type: none"> Did you receive any shares from Employee share schemes? If yes, please provide annual ESS summary and detailed statement.
			<ul style="list-style-type: none"> Did you earn any income from any other business or investments?
			<ul style="list-style-type: none"> Did you receive distributions from a managed fund or trust? If yes, please provide annual taxation statement.
			<ul style="list-style-type: none"> Did you receive any rent from investment properties? Please provide agent annual summary and details of any other expenses paid eg interest, rates etc.
			<ul style="list-style-type: none"> Other Income matters to consider
			<ul style="list-style-type: none"> Did you earn any foreign source income? If yes, do you own assets outside Australia to the value of \$50,000?
			<ul style="list-style-type: none"> Do you have an interest in any property? (Attach cost details)
			<ul style="list-style-type: none"> Did you buy or sell a property during the year? (Please provide a copy of settlement adjustment statement if the property was not your principal place of residence)
			<ul style="list-style-type: none"> Did you buy or sell any Crypto Currency or NFTs during the year? If so please provide your transactions during the year in csv.

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Deduction Records	<u>YES</u>	<u>NO</u>	
D1			<ul style="list-style-type: none"> Did you travel for work in your car apart from home to work? If Yes - (Please give details of total business km's travelled) . Note that you may have experience changes to your business km's travelled due to Covid-19.
D2			<ul style="list-style-type: none"> Did you have other travel costs for work trips not reimbursed by your employer? (eg. Bus/Taxi fares, parking, tolls)
D3			<ul style="list-style-type: none"> Did you have to wear a uniform with logo or protective clothing? If Yes - (Circle the type of clothing 'UNIFORM' or 'PROTECTIVE')
D4			<ul style="list-style-type: none"> Did you have any work related self-education expenses such as: Course fees & materials, travel to attend the course, stationery & books. If yes, please provide details.
D5			<ul style="list-style-type: none"> Did you have any other work-related expenses? (Attach relevant details): Tools Union Fees Reference Materials
			<ul style="list-style-type: none"> Did you work from home during the financial year and have a dedicated room in your residence for work during Covid-19 or under employer work from home arrangements? If so, please provide average hours per week and the estimated Floor area of room and entire house. (Note that payments for rent, rates & insurance are generally not deductible as home office expenses)
			<ul style="list-style-type: none"> Due to Covid-19, did you work from home. Please provide average hours work per week and number of days you did not work.
D7/D8			<ul style="list-style-type: none"> Did you have expenses related to investment income? (Attach relevant details): Bank charges Interest expense

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Other Additional Records:	YES	NO	
D7/D8 (con't)			<ul style="list-style-type: none"> Did you make any donations to any charities during the year?
			<ul style="list-style-type: none"> Did you have income protection insurance, paid from your own pocket and not within superfund? If yes, please provide details of premium paid.
D12			<ul style="list-style-type: none"> Did you make any personal superannuation contributions? Please provide a copy of acknowledgement of Notice of Intention to Claim form.
S1			<ul style="list-style-type: none"> Did you have a spouse during the year? (Advise their taxable income).
S2			<ul style="list-style-type: none"> If yes, did you contribute super on behalf of your spouse?
PH			<ul style="list-style-type: none"> Did you have Private health insurance? If yes, was hospital cover included? (Please send a copy of annual statement by requesting it from your health insurer. From 1 July 2019, the insurer will no longer be required to send statements automatically.)
IT8			<ul style="list-style-type: none"> Please advise the number of dependents including the age at the end of the financial year.
H1			<ul style="list-style-type: none"> Higher Education Loan Programme (HELP) or Student Financial Supplement Scheme (SFSS) accumulated debt.
PR			<ul style="list-style-type: none"> Copy of Prior year tax return (if 1st year with Enspira Financial or associated business in the group and not already provided)
			<ul style="list-style-type: none"> Prior year tax agent fee (if 1st year with Enspira Financial or associated business in the group).

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