



## **SOUTH EAST ACCOUNTING**

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### Tax Return Checklist – Individuals

Client Information	
Client Name	
Address (if different from prior year)	

Please ensure you read through each question & attach any applicable documents / provide amounts or details.

Income			
Item		Applicable (y/n)	Documents Attached?
Salary & Wages			
- Please provide PAYG Payment Summary(s)			
Investment Income	Interest Income (Bank statements)		
	Dividend Income (Dividend Statements)		
	Distribution Income (Annual Tax statement)		
	Rental Income (please request our ' <b>Rental Checklist</b> ')		
	Capital Gains – (buy and sell information)		
Business Income			
- Please request our ' <b>Business Income Checklist</b> '			
Other Income	Employer Lump Sums (Payment Summary)		
	ETP (Payment Summary)		
	Government Allowances (Payment Summary)		
	Employee Share Schemes (Payment Summary)		
	Other – Give details		

Expenses		
Item	Applicable (y/n)	Amount
- Vehicle - Did you use your car for work? o Aside from driving to and from work how many KM did you travel?		kms
- Did you have to travel for work? o E.g. overnight stays at conferences, visiting clients, etc.		\$
- Do you wear a uniform or protective clothing for work? o How much did you spend on purchasing uniform/protective clothing?		\$
- Did you do any work related study?		\$
Do you do any work from home?	Do you have a logbook showing total hours worked from home for the year?	hrs
	How much is your electricity & gas bills?	\$ pm
	Do you use your home internet for work?	\$ pm
Other expenses	Do you use your phone for work?	\$ pm
	Are you a member of any associations or unions?	\$
	Did you purchase any tools of trade?	\$
	Did you purchase any office equipment?	\$
	Was there anything else work related you were out of pocket for? (please specify)	\$
- Did you make any donations?		\$
- Did you pay for an accountant to prepare your return?		\$
- Were you out of pocket for expenses relating to your investment income (e.g. margin loans, etc.)		\$
- Did you pay for your income protection insurance personally? o Please provide a policy statement for the financial year		\$

Other Items		
Item	Applicable (y/n)	Documents Attached? /Amount
- Do you have a HECS (HELP Debt)?		\$
- Did you have private Health Insurance? o Please provide Annual Statement		
- Number of dependent children (under 21 years old or 21-24 years old and full-time student)		
Spouse details (if spouse is not a client of South East Accounting)	Name:	
	Date of Birth:	
	Taxable Income:	\$
	Was this your spouse for the full year? (if no – provide dates)	