



SOUTH EAST ACCOUNTING

Suite 5, 24-26 Woods St
Beaconsfield Vic 3807
ph: (03) 8768 8788

Tax Return Checklist – Individuals

Client Information	
Client Name	
If different from prior year:	
Address	
Bank Details	

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 'Rental Checklist')	
	Capital Gains – (buy and sell information)	
Any Cryptocurrency Sales or Swaps (Please provide statements as well as buy and sell information)		
Business Income - Please request our 'Business Income Checklist'		
Other Income	Employer Lump Sums (Payment Summary)	
	ETP (Payment Summary)	
	Government Allowances (Payment Summary)	
	Employee Share Schemes (Payment Summary)	
	Income earned overseas (include foreign tax paid)	
	Other – Give details	

Expenses			
Item		Applicable (y/n)	Amount
- Vehicle - Did you use your car for work? (Aside from driving to and from work how many KM did you travel?)			kms
- Did you have to travel for work? (E.g. overnight stays at conferences, visiting clients, etc.)			\$
- Do you wear a uniform or protective clothing for work? (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
	Do you use your home internet for work?		\$ pm
	Do you use your phone for work?		\$ pm
Other expenses	Are you a member of any associations or unions?		\$
	Did you purchase any tools of trade? (please provide breakdown if over \$300)		\$
	Did you purchase any office stationery or equipment? (please provide breakdown if over \$300)		\$
	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 Annual Statement			\$

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 & Date of Birth for each (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:		\$
	Fringe Benefits:		\$
	Reportable Superannuation:		\$

	Was this your spouse for the full year? (if no – provide dates)		\$
	Is your Spouse an Australian Resident?		