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?		
	Did your spouse have Health Insurance?		