

**2019/2020**

**INDIVIDUAL INCOME TAX RETURN CHECKLIST**

Please email or post this form back to our office **PRIOR** to your appointment.

Email: [admin@jascpa.com.au](mailto:admin@jascpa.com.au)

Post: PO Box 3690, Caroline Springs VIC 3023

<b>Full Name</b>		
<b>Tax File Number (TFN)</b>		
<b>Has name changed since last return?</b>	Yes <input type="checkbox"/> No <input type="checkbox"/> If Yes, previous name: _____	
<b>Date of Birth</b>		
<b>Are you an Australian resident?</b>	Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure <input type="checkbox"/>	
<b>ABN (if applicable)</b>		
<b>Address</b>		
<b>Telephone Contacts</b>	Mobile:	
	Business Hours (work):	
	After Hours (home):	
<b>Email</b>		
<b>Electronic banking details (for refund if applicable)</b>	Account Name:	
	BSB:	
	Account No:	
<b>Main Occupation</b>		
<b>Spouse name &amp; Date of Birth</b>		

**Please use this checklist and bring or email any relevant information with you as we cannot be sure when the Online Services for Agents will have these details available to be uploaded**

**INCOME**

**AMOUNT**

- |  |  |         |
|--|--|---------|
| 1. Salary or wages   | Yes <input type="checkbox"/> No <input type="checkbox"/> | \$_____ |
| 2. Allowances, earnings, tips, director's fees etc.  | Yes <input type="checkbox"/> No <input type="checkbox"/> | \$_____ |
| 3. Employer lump sum payments  | Yes <input type="checkbox"/> No <input type="checkbox"/> | \$_____ |
| 4. Employment termination payments   | Yes <input type="checkbox"/> No <input type="checkbox"/> | \$_____ |
| 5. Australian Government allowances and payments like Newstart, Youth Allowance and Austudy payments | Yes <input type="checkbox"/> No <input type="checkbox"/> | \$_____ |
| 6. Australian Government pensions and allowances   | Yes <input type="checkbox"/> No <input type="checkbox"/> | \$_____ |
| 7. Australian annuities and superannuation income streams including super lump sum payments          | Yes <input type="checkbox"/> No <input type="checkbox"/> | \$_____ |

8. Gross Interest Received Yes  No  \$ \_\_\_\_\_
9. Dividends Received (Franked & Unfranked) Yes  No  \$ \_\_\_\_\_
10. Employee share schemes Yes  No  \$ \_\_\_\_\_
11. Other Income
- Distributions from partnerships and/or trusts \$ \_\_\_\_\_
  - Rental Properties (*supply income & expense details for each property in separate attachment*) \$ \_\_\_\_\_
  - Net income or loss from business (as a sole trader) \$ \_\_\_\_\_
  - Capital gains (please supply disposal & purchase details) \$ \_\_\_\_\_
  - Foreign income \$ \_\_\_\_\_

## DEDUCTIONS

AMOUNT YES NO

### D1-D4 Work-related Expenses

- Motor Vehicles Make: \_\_\_\_\_ Model: \_\_\_\_\_ Kms: \_\_\_\_\_ \$ \_\_\_\_\_ Yes  No
- Travel (Fares & Accommodation) – please provide details \$ \_\_\_\_\_ Yes  No
- Uniforms / Workwear / Cleaning / Dry Cleaning Expenses \$ \_\_\_\_\_ Yes  No
- Self-education & Professional Development \$ \_\_\_\_\_ Yes  No
- Union, text books, subscriptions & memberships \$ \_\_\_\_\_ Yes  No
- Course fees, seminars & conferences \$ \_\_\_\_\_ Yes  No
- Telephone, stationary, computer & internet \$ \_\_\_\_\_ Yes  No
- Tools & Equipment \$ \_\_\_\_\_ Yes  No
- Home Office Expenses – please advise of *est.* number of hours worked from home and details of costs ie purchase of printer, office furniture etc \$ \_\_\_\_\_ Yes  No

### D5-D11 Other work-related expenses

- Gifts & Donations \$ \_\_\_\_\_ Yes  No
  - Income Protections Insurance \$ \_\_\_\_\_ Yes  No
  - Interest deductions \$ \_\_\_\_\_ Yes  No
  - Dividends deductions \$ \_\_\_\_\_ Yes  No
  - Costs of managing prior year's tax affairs \$ \_\_\_\_\_ Yes  No
  - Other deductions (*please specify*) \$ \_\_\_\_\_ Yes  No
- \_\_\_\_\_

### D12. Personal superannuation contributions

Yes  No

Full name of fund: \_\_\_\_\_ Member/Account no: \_\_\_\_\_

Fund ABN: \_\_\_\_\_ Fund TFN: \_\_\_\_\_

- Have you provided the fund a notice of intention to deduct the contribution? Yes  No
- Has this notice been acknowledged by the fund? Yes  No

**Please note you cannot claim a deduction unless the fund has acknowledged the contributions**