

## Financial Year

### INDIVIDUAL INCOME TAX RETURN CHECKLIST

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

**PLEASE NOTE FOR EXISTING CLIENTS: IF YOUR PERSONAL DETAILS HAVE NOT CHANGED IN THE LAST 12 MONTHS YOU WILL NOT BE REQUIRED TO FILL IN PAGE 1.**

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

Post: PO Box 3690, Caroline Springs VIC 3023

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

## INCOME

Please indicate which of the following income types you had for the year and provide additional detail & documents where requested.

	YES	NO
1. Salary or wages	<input type="checkbox"/>	<input type="checkbox"/>
2. Allowances, earnings, tips, director's fees etc.	<input type="checkbox"/>	<input type="checkbox"/>
3. Employer lump sum payments	<input type="checkbox"/>	<input type="checkbox"/>
4. Employment termination payments	<input type="checkbox"/>	<input type="checkbox"/>
5. Australian Government allowances & payments like Newstart, Youth Allowance & Austudy payments	<input type="checkbox"/>	<input type="checkbox"/>
6. Australian Government pensions and allowances	<input type="checkbox"/>	<input type="checkbox"/>
7. Australian annuities and superannuation income streams including super lump sum payments	<input type="checkbox"/>	<input type="checkbox"/>
8. Gross Interest Received	<input type="checkbox"/>	<input type="checkbox"/>
9. Dividends Received (Franked & Unfranked) <i>(Provide annual investment reports {i.e. Commsec, Nabtrade, etc, or direct dividend documents})</i>	<input type="checkbox"/>	<input type="checkbox"/>
10. Employee share schemes <i>(Provide annual employer share scheme documents)</i>	<input type="checkbox"/>	<input type="checkbox"/>
11. Distributions from partnerships and/or trusts <i>(Provide Distribution Summaries)</i>	<input type="checkbox"/>	<input type="checkbox"/>
12. Rental Properties <i>(Please fill in our Rental property worksheet available on our website - <a href="#">Click here</a>)</i>	<input type="checkbox"/>	<input type="checkbox"/>
13. Net income or loss from business (as a sole trader) <i>(Please provide us access to your bookkeeping software/documentation)</i>	<input type="checkbox"/>	<input type="checkbox"/>
14. Capital Gains / Losses on disposal of investments. <i>(Please supply disposal &amp; purchase details)</i>	<input type="checkbox"/>	<input type="checkbox"/>
15. Foreign income	<input type="checkbox"/>	<input type="checkbox"/>
16. Pandemic Leave Disaster Payments <b><i>(YOU MUST retrieve these amounts from your Centrelink Online Account as we have no access to view them)</i></b>	<input type="checkbox"/>	<input type="checkbox"/>

**DEDUCTIONS**

**YES NO**

Motor Vehicles Deductions                      Car Make: _____ Model: _____ <b>Methods of claim.</b> 1. <b>Kilometre method</b> - (Max of 5,000km & only work travel. <u>No home to work &amp; back home again.</u> ) <span style="margin-left: 400px;">Kilometres travelled: _____</span> 2. <b>Logbook Method</b> – Must have kept a logbook for 12 week period over the last 3 years to determine work % <b>(Please fill in our Motor Vehicle Logbook Method worksheet available on our website (Click here))</b>	<input type="checkbox"/>	<input type="checkbox"/>																		
Travel (Fares & Accommodation) – Must be work related. Please provide details. - Total Cab Fares/ Public Transport: \$ _____ - Total Flights: \$ _____ - Total Accommodation: \$ _____	<input type="checkbox"/>	<input type="checkbox"/>																		
Uniforms / Workwear / Laundry Expenses / Drycleaning Details of item _____ \$ _____      Details of item _____ \$ _____ Details of item _____ \$ _____      Details of item _____ \$ _____ Please note only work uniform (must have logo), industry specific and protective clothing can be claimed	<input type="checkbox"/>	<input type="checkbox"/>																		
- Self-education & Professional Development Details of item _____ \$ _____      Details of item _____ \$ _____	<input type="checkbox"/>	<input type="checkbox"/>																		
- Union, text books, subscriptions & memberships Details of item _____ \$ _____      Details of item _____ \$ _____ Details of item _____ \$ _____      Details of item _____ \$ _____	<input type="checkbox"/>	<input type="checkbox"/>																		
- Course fees, seminars & conferences Details of item _____ \$ _____      Details of item _____ \$ _____	<input type="checkbox"/>	<input type="checkbox"/>																		
- Telephone, internet, stationary, tools. Mobile Phone      Annual \$ _____      Business use % _____ Home Internet      Annual \$ _____      Business use % _____ Gas (Home)      Annual \$ _____      Business use % _____ Electricity (Home) Annual \$ _____      Business use % _____ Stationary      Annual \$ _____ Tools      Annual \$ _____ Other      Annual \$ _____	<input type="checkbox"/>	<input type="checkbox"/>																		
- Home Office Equipment – Item over \$300 must be depreciated. <table style="width:100%; border-collapse: collapse; margin-top: 5px;"> <thead> <tr> <th style="text-align: left; border-bottom: 1px solid black;"><u>ASSET PURCHASED</u></th> <th style="text-align: left; border-bottom: 1px solid black;"><u>AMOUNT PAID</u></th> <th style="text-align: left; border-bottom: 1px solid black;"><u>DATE PURCHASED</u></th> </tr> </thead> <tbody> <tr> <td><i>EG. Computer (Purchase)</i></td> <td><b>\$2000</b></td> <td><b>10 /09/2020</b></td> </tr> <tr> <td>_____</td> <td>\$ _____</td> <td>____ / ____ / _____</td> </tr> <tr> <td>_____</td> <td>\$ _____</td> <td>____ / ____ / _____</td> </tr> <tr> <td>_____</td> <td>\$ _____</td> <td>____ / ____ / _____</td> </tr> <tr> <td>_____</td> <td>\$ _____</td> <td>____ / ____ / _____</td> </tr> </tbody> </table>	<u>ASSET PURCHASED</u>	<u>AMOUNT PAID</u>	<u>DATE PURCHASED</u>	<i>EG. Computer (Purchase)</i>	<b>\$2000</b>	<b>10 /09/2020</b>	_____	\$ _____	____ / ____ / _____	_____	\$ _____	____ / ____ / _____	_____	\$ _____	____ / ____ / _____	_____	\$ _____	____ / ____ / _____	<input type="checkbox"/>	<input type="checkbox"/>
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- Home Office Hours:                      Total Hours Per Week worked from home _____	<input type="checkbox"/>	<input type="checkbox"/>																		
- Gifts & Donations:      Charity _____ \$ _____      Charity _____ \$ _____ Charity _____ \$ _____      Charity _____ \$ _____	<input type="checkbox"/>	<input type="checkbox"/>																		

YES NO

- Income Protections Insurance Annual Premium Paid \$ _____ (Please note, Life insurance & TPD/Trauma insurance are not deductible.)	<input type="checkbox"/>	<input type="checkbox"/>
- Interest deductions Annual Amount \$ _____ Investment _____	<input type="checkbox"/>	<input type="checkbox"/>
- Dividends deductions Annual Amount \$ _____ Investment _____	<input type="checkbox"/>	<input type="checkbox"/>
- Costs of managing prior year's tax affairs Annual Amount \$ _____	<input type="checkbox"/>	<input type="checkbox"/>
Other deductions (please specify) Details of item _____ \$ _____ Details of item _____ \$ _____	<input type="checkbox"/>	<input type="checkbox"/>
<b>D12. Personal superannuation contributions – <span style="background-color: yellow;">Reminder this is Not Employer Contributions</span></b>  Total amount contributed \$ _____  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 <input type="checkbox"/> No <input type="checkbox"/> – Has this notice been acknowledged by the fund? Yes <input type="checkbox"/> No <input type="checkbox"/> <i>Please note you cannot claim a deduction unless the fund has acknowledged the contributions</i>	<input type="checkbox"/>	<input type="checkbox"/>