



Individual Tax Checklist

Client Name: _____ Year: _____

INCOME

- | | |
|--|---|
| <input type="checkbox"/> Payment Summaries | <input type="checkbox"/> Rental Property Income |
| <input type="checkbox"/> Lump Sum & Termination Payment Summaries | <input type="checkbox"/> Business Income |
| <input type="checkbox"/> Government Benefit Payment Statements | <input type="checkbox"/> Foreign Income |
| <input type="checkbox"/> Interest Income from Banks & Building Societies | <input type="checkbox"/> Capital Gains |
| <input type="checkbox"/> Dividend Statements | <input type="checkbox"/> Employee Share Schemes |
| <input type="checkbox"/> Other _____ | |

Do you have private health insurance?

YES/NO

If yes, please provide your private health insurance statement.

DEDUCTIONS

D1 – Car Expenses

1. How do your employment duties demand the need for you to use the car for work related purposes?

2. Cents Per Kilometre Claim

- A. Cents per kilometre rate applicable: **.72** cents
- B. Total number of business kilometres travelled throughout the year: X _____ kms

Total claim under the cents per kilometre method \$

D2 – Travel Expenses

3. Why did your employment duties demand the need for business travel?



D3 – Laundry

- A. _____ \$
- B. _____ \$
- C. _____ \$
- Total** \$ _____
- D. \$1.00 per wash x _____ loads x _____

D4- Self-education

4. Please provide an explanation of the course syllabus:

5. Please circle the statement below that **best** describes the connection that the course of self-education has with your current work activities:

- The course of self-education is directly related to my current employment activities;
- The course of self-education is likely to lead to increased income from my employment; or
- Other reasons

D5 – Other

6. **Home Office Expense**

- | | | | | |
|-------------------------------------|---|---------------------------|------|-------|
| A. Number of hours home office used | X | Standard rate | = | Claim |
| B. _____ Hours: | X | .52 cents per hour | = \$ | _____ |
| C. _____ Hours: | X | .80 cents per hour | = \$ | _____ |

(80c per hour for COVID between 1 March 2020 until 30 June 2020)

7. Tools & Equipment

List of tools purchased during the year that are outright deductible.

Description	Date Purchased & Amount	How is it used
_____	_____	_____
_____	_____	_____
_____	_____	_____
Total outright deduction		\$ _____

8. Total union fees paid: \$ _____

9. Did you receive an overtime meal allowance expense?
If so, please provide receipts for expenses incurred. \$ _____

10. Depreciation of Assets

Description of Assets	Date Purchased & Amount	How is it used
_____	_____	_____
_____	_____	_____
_____	_____	_____

D6 – Gifts and Donations

11. If property was donated or gifted to a charity, institution etc, please provide the details below

Date	Recipient	Item Donated	Amount/Value
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

D10 – Tax Agent Fees

12. Did you incur fees for your return to be completed and lodged in the last financial year? **YES/NO**

If **yes**, please provide the amount paid? \$ _____

13. Any other deductions not listed above?

Bank Details for Tax Refund	
BSB: _____	Account Number: _____
Account Name: _____	



By signing the below, I/we consent to the appointment of Tax Strategies Australia trading as Tax Dragon and engage Tax Dragon to prepare my/our income tax return for 2020.

Taxpayer's Declaration

- A. I confirm that I wish to make the above claims on the basis that I have incurred the above expenses in deriving my assessable income and I have the necessary records to substantiate my claim;
- B. My tax agent has explained to me the law as it relates to claims for compulsory uniform expenses; and
- C. I understand that if I have any further queries it is my responsibility to raise them with my tax agent or request a Private Binding Ruling from the ATO.

Signed: _____

Dated: _____

Payment Methods Available	
<input type="checkbox"/>	<p>Fee From Refund: By selecting this option, I hereby authorise deduction of my accounting Fees from my tax refund. I acknowledge that I will pay a \$22 administration charge for this service. I instruct Tax Dragon to deposit the balance directly to my nominated bank account. A credit card authority is required to be completed before the return is lodged and in the event that your refund is not being refunded by the Australian Taxation Office.</p>
<input type="checkbox"/>	<p>Credit Card: Please complete the credit card authority below.</p> <p>Card Type (please circle): VISA MASTERCARD</p> <p>Name of Cardholder: _____</p> <p>Card Number: _____ Expiry: _____ CCV: _____</p> <p>Signature of Cardholder: _____ Date: _____</p>