

# Individual Tax Return Checklist

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Below is a checklist of items that may assist you in collating your documents in order for us to process your income tax return.

Please tick all relevant items and attach these documents.

Once completed, you may email the completed copy and accompanying documents to us at [office@ultimate-tax.com.au](mailto:office@ultimate-tax.com.au) or print out and mail the documents to us.


*Existing clients - within the Personal Details section you only need to complete your name and then any information which has changed since last year. New clients - please fill in all the required information.*

## Personal Details

Name:		
Address:		
Phone/Mobile:		
Email:		
Date of Birth:		
Tax file Number:		
Occupation:		
Bank Details For Any Tax Refunds:	BSB:	Account number:
	Acc. Name:	Financial Institution:
Private Health Cover	Please provide annual statement	
Spouse Details to Include in Your Tax Return:	Full Name:	Date of Birth:
	Taxable Income:	Spouse for full year:
Number of Dependent Children:		
Child Support Amounts Paid for the year:		

## Income

PAYG Payment Summary from employer/s	PAYG Payment Summary from Centrelink
Dividend statements	Managed Fund distribution statements
Interest income from banks. List each account separately	

Capital gains information (share or property buy & sell contracts)			
Cryptocurrency		Foreign income	
Rental income. Refer to our		Business income. Refer to our	
Distribution from partnership or trust			
<b>Expenses</b>		Total Amount (\$)	Work Use %
Accounting fees			
Donations to charities (Charities must be registered Deductible Gift Recipients (DGR) in order for donations to be tax deductible. Please provide a copy of invoices for any large donations).			
Work related car expenses (other than to and from work)			
- How many KM travelled for work activities			
- Work related % if logbook kept		Will need to contact for more details	
- Fuel			
- Registration			
- Insurance			
- Repairs & maintenance			
- Interest on vehicle loan			
- Other - provide details			
Protective clothing or uniforms			
Laundry for uniforms			
- How many times per week do you wash your uniform			
- Do you wash your uniform on its own (not mixed with conventional clothing)			
Work related self education expenses (Please provide copy of invoices)			
Union fees			
Subscriptions/membership			
Stationery			
Telephone/Mobile			
Internet			
Home office - hours per week		 HOME OFFICE DIARY	
Electricity			
Gas			
Personal super contributions statement			
Income protection insurance statement			
Other expenses - please list			