



TAX DOMAIN

TAXATION & ACCOUNTING SERVICES

2021 Individual Tax Return Checklist

Full Name	
Tax File Number	
Date of birth	
ABN (if applicable)	
Address	
Address (postal) (Put 'as above' if the same)	
Telephone contacts	Mobile:
	Business Hours (work) :
	After Hours (home):
Email	
Electronic banking Details (for refund if applicable)	BSB:
	Account Number:
Occupation	
	Do you run your own business as a sole trader? YES/NO Do you run your own business in a company, trust or partnership? YES/NO
Spouse's full name (Please include married/de facto/same-sex)	
Spouse's date of birth	
Spouse's TFN	
Approximate Income (if known)	
Dependent Child/Children Name(s) and date of birth	

Income – Please provide evidence	Yes	No	Amount
1. Salary or wages			
2. Allowances, earnings, tips, director's fees etc. <i>(please specify)</i>			
3. Employer lump sum payments			
4. Employment termination payments			
5. Australian Government allowances and payments like Newstart, Youth Allowance and Austudy payments			
6. Australian Government pensions and allowances			
7. Australian annuities and superannuation income streams			
8. Australian superannuation lump sum payments			
9. Attributed personal services income			
10. Gross Interest <i>(please specify)</i>			
11. Dividends <i>(please specify)</i>			
12. Employee share schemes			
13. Distributions from partnerships and/or trusts			
14. Personal services income (PSI)			
15. Net income or loss from business (as a sole trader)			
16. Deferred non-commercial business losses			
17. Net farm management deposits or repayments			
18. Capital gains			
19. Foreign entities:			
– Direct or indirect interests in a controlled foreign company			
20. Foreign source income (including foreign pensions) and foreign assets or property			
21. Rent			
22. Bonuses from life insurance companies or friendly societies			
23. Forestry managed investment scheme income			
24. Other income (please specify below)			

Deductions – Please provide evidence	Yes	No	Amount
D1. Work-related car expenses			
– Cents per kilometre method (up to a maximum of 5,000 kms) <i>Only claimable if you carry bulky tools of trade and there is no secure storage area for such items at the workplace location.</i> <i>(please specify eg. Gladstone to Biloela and return x 3 trips)</i>			
– Log book method <i>Logbook to be supplied for 12 consecutive weeks showing business and private use and not older than 2 years</i>			
Receipts for expenses to be provided include fuel, registration, insurance, repairs ect			
Have any car expenses been reimbursed by your employer?			
D2. Work-related travel expenses			
Employee domestic travel with a reasonable travel allowance			
– If the claim is more than the reasonable travel allowance rate, do you have receipts for your expenses?			
Overseas travel with a reasonable travel allowance			
– Do you have receipts for accommodation expenses?			
– If travel is for 6 or more nights in a row, do you have travel records? (e.g. a travel diary)			
Employee without a reasonable travel allowance			
– Did you incur and have receipts for airfares?			
– Did you incur and have receipts for accommodation?			
– Did you incur and have receipts for hire cars (if applicable)?			
– Did you incur and have receipts for meals and incidental expenses?			
– Do you have any other travel expenses?			
Have any travel expenses been reimbursed by your employer?			
Other work-related travel expenses (e.g., a borrowed car, public transport)			
<i>(Please specify)</i>			

Deductions – Please provide evidence	Yes	No	Amount
D3. Work-related clothing, laundry and dry cleaning expenses			
Protective clothing			
Occupation specific clothing			
Compulsory uniform (must have permanently attached logo)			
Laundry expenses (up to \$150 without receipts)			
Dry cleaning expenses			
Other claims such as mending/repairs, etc (please specify)			
Have any clothing, laundry and dry cleaning expenses been reimbursed by your employer?			
D4. Work-related self-education expenses			
Course taken at educational institution:			
– Union fees			
– Course fees (<i>The course must have a sufficient connection to your current employment activities as an employee</i>)			
– Books, stationery			
– Travel			
– Other (please specify)			
Have any self-education expenses been reimbursed by your employer?			
D5. Other work-related expenses			
Home office expenses (including working from home due to COVID-19)			
Computer and software			
Internet (<i>cost per month & % work related use required</i>)			
Telephone/mobile phone (<i>cost per month & % work related use required</i>)			
Tools and equipment (<i>receipts required for items over \$300</i>)			
Subscriptions and union fees			
Journals/periodicals			
Depreciation			
Sun protection products (i.e., sunscreen and sunglasses)			
Seminars and courses not at an educational institution			
Any other work related deductions (please specify)			
Have any other work-related expenses been reimbursed by your employer?			

Deductions – Please provide evidence	Yes	No	Amount
Other types of deductions			
D6. Low value pool deduction			
D7. Interest deductions			
D8. Dividend deductions			
D9. Gifts or donations (charity name required – please specify)			
D10. Cost of managing tax affairs <ul style="list-style-type: none"> • Interest charged by the ATO (e.g., including SIC and GIC) • Litigation costs • Other expenses incurred in managing tax affairs 			
D11. Deductible amount of undeducted purchase price of a foreign pension or annuity			
D12. Personal superannuation contributions			
Full name of fund: Account no:			
Fund ABN: Fund TFN:			
– Have you provided the fund a notice of intention to deduct the contribution?			
– Has this notice been acknowledged by the fund?			
<i>Please supply a copy for our records</i>			
D13. Deduction for project pool			
Other types of deductions (continued)			
D14. Forestry managed investment scheme deduction			
D15. Other deductions (please specify)			
Have any amounts at D6 to D15 been reimbursed by your employer?			
L1. Tax losses of earlier income years			

Tax offsets/rebates – Please provide evidence	Yes	No	Amount
T1. Are you a senior Australian or a pensioner?			
T2. Did you receive an Australian superannuation income stream?			
T3. Did you make superannuation contributions on behalf of your spouse?			
T4. Did you live in a remote area of Australia or serve overseas with the Australian defence force or the UN armed force in the 2021 income year?			
T5. Did you maintain a dependant who is unable to work due to invalidity or carer obligations in the 2021 income year?			
T6. Are you entitled to claim the landcare and water facility tax offset?			
T7. Are you involved in an early stage venture capital limited partnership?			
T8. Are you an early stage investor in an early stage innovation company?			
T9. Are you entitled to any other non-refundable tax offsets?			
T10. Are you entitled to any other refundable tax offsets?			

Other relevant information – Please provide evidence	Yes	No	Amount
A. Are you entitled to the Medicare levy exemption or reduction in the 2021 income year? <i>(If yes, please specify)</i>			
B. Did you and your spouse/dependants have private health insurance in the 2021 income year? <i>(If yes, please provide the annual statement received from your health fund)</i>			
C. Were you under the age of 18 on 30 June 2021?			
D. Did you become an Australian tax resident at any time during the income year?			
E. Did you cease to be an Australian tax resident at any time during the income year?			
F. Did you make a non-deductible (non-concessional) personal super contribution?			
G. Do you have a HELP liability, Student Financial Supplement Loan debt, Student Start-up Loan debt or Trade Support Loan debt?			
H. Are you a working holiday maker in Australia on a 417 (working holiday) visa or 462 (working holiday) visa?			
I. Did a trust or company distribute income to you in respect of which Family Trust Distribution Tax (FTDT) was paid by the trust or company?			
J. Do you have a loan with a private company at 30 June 2021 or has such a loan amount been forgiven in the 2021 income year? Has a private company made a payment to you in the 2021 income year (other than a dividend)? <i>(If yes, please specify)</i>			

Other relevant information – Please provide evidence	Yes	No	Amount
K. Did you receive any benefit from an employee share acquisition scheme?			
L. Family Tax Benefit ('FTB'):			
– Did you have care of a dependent child in the 2021 income year?			
– Did you or your spouse receive FTB through the Department of Human Services in the 2021 income year?			
Income tests information			
– Do you have any reportable fringe benefits amounts in the 2021 income year?			
– Do you have any reportable employer superannuation contributions in the 2021 income year?			
– Did you receive any tax-free government pensions in the 2021 income year?			
– Did you receive any target foreign income in the 2021 income year?			
– Did you have a net financial investment loss in the 2021 income year?			
– Did you have a net rental property loss in the 2021 income year?			
– Did you pay child support in the 2021 income year?			
– Number of dependent children?			
Spouse details (if applicable)			
<p>– Did you have a spouse for the full year from 1 July 2020 to 30 June 2021? If you had a spouse for only part of the income year, please specify the dates between 1 July 2020 to 30 June 2021 when you had a spouse:</p> <p>From ____ / ____ / _____ to ____ / ____ / _____</p>			
<p>– What was your spouse's taxable income for the 2021 income year?</p> <p>\$</p>			
<p>– Does your spouse have a share of trust income on which the trustee is assessed under Section 98 that has not been included in your spouse's taxable income?</p>			
<p>– Did a trust or company distribute income to your spouse in respect of which family trust distribution tax was paid by the trust or company for the 2021 income year?</p>			

