



## Personal ITR Checklist

Name	_____	Email	_____
Contact Number	_____	Date Of Birth	_____
Occupation	_____	No of Dependants	_____
Bank Details	BSB _____	Account #	_____

**Payment Method (Please Circle)**      Pay Up Front      Fee From Refund      (incurs \$22 Admin Fee)

### Information Attached

Copies of Payment Summaries/Group Certificates	Y	N	N/A
Private Health Insurance Certificate	Y	N	N/A
Other _____	Y	N	N/A

### Income - If answering Yes, please provide details

Did you earn income as an employee/ Paid Parental Leave/ Pension from centrelink?	Y	N
Details _____		
Did you receive any interest on Bank Accounts?	Y	N
Details _____		
Do you own Shares? Did you receive any dividend income?	Y	N
Details _____		
Did you sell any large assets this year? (eg rental property, shares etc)	Y	N
Details _____		
Do you receive any other income eg Superannuation Income, Austudy, Contracting, Foreign, Trust, Termination	Y	N
Details _____		
Do you own a Rental Property?	Y	N
Please complete rental property checklist for each property _____		

**Please Turn Over For Expense Information**

## Expense Details - If answering Yes, please provide details

Did you use your personal car for work purposes? (other than driving to and from work)	Y	N
Car Make & Model	Km's Travelled	
Did you travel overnight for your work?	Y	N
Cost of Accommodation, Food & Incidentals		
Do you wear a uniform? Did you purchase any protective clothing eg non slip shoes, Hi Vis etc?	Y	N
Details		
Are you Studying, and does your course have a direct relation to your work?	Y	N
Details		
Do you do work related to your employment from home?	Y	N
Amounts and Details		
Did you purchase any stationary, subscriptions etc related to your employment?	Y	N
Hours Per Week	Internet per month	
Do you use your mobile in relation to your employment?	Y	N
Amount per Month	Percentage used for work	
Did you purchase any sun protection eg Hats, Sunglasses, Sunscreen?	Y	N
Amounts and Details		
Did you make any donations to registered charities?	Y	N
Amounts and Details		
Did a Tax Agent prepare your last years tax return, if so how much did you pay?	Y	N
Amounts and Details		
Do you have Income Protection Insurance outside of super?	Y	N
Amounts and Details		
Other Expenses	Y	N
Other Details		
Do you have a spouse, if yes please provide the following details. 1. Name & DOB 2. Taxable Income, 3. Reportable Fringe Benefits, 4. Reportable Super Contributions, 5. Child Support paid, 6. Net Investment Loss.		
1	2	3
4	5	6
Have you incurred over \$2162 in out of pocket Medical Expenses?	Y	N
(note if you do not claim in 2014/15 year you will not be able to claim)		
Have you paid any child support? If so how much	Y	N