

## 2018 individual income tax return checklist

<b>Full Name</b>			
<b>Tax File Number</b>		<b>Are you an Australian resident?</b>	<b>YES / NO</b>
<b>ABN (if applicable)</b>			
<b>Date of birth</b>		<b>Age at 30 June 2018</b>	
<b>Name changed since last return?</b> (If yes, what is your previous name?)	<b>YES / NO</b>		
<b>Address</b>			
<b>Address (postal)</b> (Put 'as above' if the same)			
<b>Telephone contacts</b>	<b>Mobile:</b>		
	<b>Business Hours (work):</b>		
	<b>After Hours (home):</b>		
<b>Email</b>			
<b>Electronic Banking Details</b>	<b>BSB:</b>		
	<b>Account Number:</b>		
	<b>Account Name:</b>		
<b>Occupation</b>	<b>Do you run your own business as a sole trader?</b>		<b>YES / NO</b>
	<b>Do you run a business in a company/trust/partnership?</b> YES / NO		

<b>Spouse's full name</b>	
<b>Spouse's date of birth</b>	
<b>Spouse's TFN</b>	
<b>Approximate Income (if known)</b>	

1. Do you have any dependants (children up to the age of 21, full time students under the age of 25, parents or parents in law) living with you?

**YES / NO**.....If YES, please provide short summary of the details below:

FULL NAME	DATE OF BIRTH	RELATIONSHIP TO YOU
1.		
2.		
3.		
4.		

2. Have you had a change in marital status during the income year? (Please circle)

**YES / NO**

3. Have you had a change in occupation or started a new job during the income year? (Please circle)

**YES / NO**

4. Have you had a change of address during the income year? (Please circle)

**YES / NO**

5. Did you buy or sell any assets during the income year? (Please circle)  
(e.g., shares, rental property, main residence)

**YES / NO**.....If YES, please provide short summary of the details below:

Type of asset (e.g., shares/ holiday home)	Date acquired (approx)	Price sold for (approx)

6. Are you a new client to Advantage Accountancy this year?

**YES / NO**

If YES, do you authorise our firm to contact your previous accountant directly and request copies of relevant documents if needed?

**YES / NO**

If YES, please provide short summary of the details below:

<b>Firm Name</b>	
<b>Accountant Name</b>	
<b>Contact Details</b>	
<b>Details of work done</b>	

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

<b>DEDUCTIONS</b>		<b>Yes / No</b>
<b>D1. Work related car expenses</b>		
– Cents per kilometer method (up to a maximum of 5,000 kms)		Yes / No
– Log book method		Yes / No
<b>D2. Work related travel expenses</b>		
<b>Employee domestic travel with a reasonable travel allowance</b>		
– If the claim is more than the reasonable travel allowance rate, do you have receipts for your expenses?		Yes / No
<b>Overseas travel with a reasonable travel allowance</b>		
– Do you have receipts for accommodation expenses?		Yes / No
– If travel is for 6 or more nights in a row, do you have travel records? (e.g. a travel diary)		Yes / No
<b>Employee without a reasonable travel allowance</b>		
– Did you incur and have receipts for airfares?		Yes / No
– Did you incur and have receipts for accommodation?		Yes / No
– Did you incur and have receipts for hire cars (if applicable)?		Yes / No
– Did you incur and have receipts for meals and incidental expenses?		Yes / No
– Do you have any other travel expenses?		Yes / No
Other work-related travel expenses (e.g., a borrowed car, public transport)		Yes / No
<b>D3. Work related uniform and other clothing expenses</b>		
Protective clothing		Yes / No
Occupation specific clothing		Yes / No
Non-compulsory uniform		Yes / No
Compulsory uniform		Yes / No
Conventional clothing		Yes / No
Laundry expenses (up to \$150 without receipts)		Yes / No
Dry cleaning expenses		Yes / No
Other claims such as mending/repairs, etc ( <i>please specify</i> )		Yes / No

<b>DEDUCTIONS</b>		<b>Yes / No</b>
<b>D4. Work related self-education expenses</b>		
<b>Course taken at educational institution:</b>		
– Union fees		Yes / No
– Course fees		Yes / No
– Books, stationery		Yes / No
– Travel		Yes / No
– Other (please specify)		Yes / No
<b>D5. Other work-related expenses</b>		
Home office expenses		Yes / No
Computer and software		Yes / No
Telephone/mobile phone		Yes / No
Tools and equipment		Yes / No
Subscriptions and union fees		Yes / No
Journals/periodicals		Yes / No
Depreciation		Yes / No
Sun protection products (i.e., sunscreen and sunglasses)		Yes / No
Seminars and courses not at an educational institution		Yes / No
Any other work-related deductions (please specify)		Yes / No

<b>DEDUCTIONS</b>		<b>Yes / No</b>
<b>Other types of deductions</b>		
D6. Low value pool deduction		Yes / No
D7. Interest deductions		Yes / No
D8. Dividend deductions		Yes / No
D9. Gifts or donations		Yes / No
D10. Cost of managing tax affairs		Yes / No
D11. Deductible amount of undeducted purchase price of a foreign pension or annuity		Yes / No
D12. Personal superannuation contributions		Yes / No
Full name of fund: ..... Account no: ..... Fund ABN: ..... Fund TFN: .....		
Full name of fund: ..... Account no: ..... Fund ABN: ..... Fund TFN: .....		
– Have you provided the fund a notice of intention to deduct the contribution?		Yes / No
– Has this notice been acknowledged by the fund?		Yes / No
D13. Deduction for project pool		Yes / No
D14. Forestry managed investment scheme deduction		Yes / No
D15. Other deductions (please specify)		Yes / No
L1. Tax losses of earlier income years		Yes / No



<b>OTHER RELEVANT INFORMATION</b>		<b>Yes / No</b>
M1. Are you entitled to the Medicare levy exemption or reduction in the 2018 income year? <i>(If yes, please specify)</i>		Yes / No
M2. Did you and your spouse/dependents have private health insurance in the 2018 income year?  <i>(If yes, please provide the annual statement received from your health fund)</i>		Yes / No
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A1. Were you under the age of 18 on 30 June 2018?		Yes / No
A2. Did you become an Australian tax resident at any time during the income year?		Yes / No
A3. Did you cease to be an Australian tax resident at any time during the income year?		Yes / No
A4. Are you a working holiday maker in Australia on a 417 (working holiday) visa or 462 (working holiday) visa?		Yes / No
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Did you make a <b>non-deductible</b> (non-concessional) personal <b>super</b> contribution?		Yes / No
Do you have a <b>HELP</b> liability, Student Financial Supplement Loan debt, Student Start-up Loan debt or Trade Support Loan debt?		Yes / No
Did you pay <b>PAYG Income Tax Instalments</b> during the financial year?		Yes / No
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?		Yes / No
Do you have a loan with a private company at 30 June 2018 or has such a loan amount been forgiven in the 2018 income year? Has a private company made a payment to you in the 2018 income year (other than a dividend)? <i>(If yes, please specify)</i>		Yes / No
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<b>Family Tax Benefit ('FTB')</b>		
Did you have care of a dependent child in the 2018 income year?		Yes / No
Did you or your spouse receive FTB through the DHS in the 2018 income year? NB: Lump Sum claims must be made through mygov before 30 June 2018.		Yes / No



<b>OTHER RELEVANT INFORMATION</b>		<b>Yes / No</b>
<b>Income tests information</b>		
IT1. Do you have any reportable fringe benefits amounts in the 2018 income year?		Yes / No
IT2. Do you have any reportable employer superannuation contributions in the 2018 income year?		Yes / No
IT3. Did you receive any tax-free government pensions in the 2018 income year?		Yes / No
IT4. Did you receive any target foreign income in the 2018 income year?		Yes / No
IT5. Did you have a net financial investment loss in the 2018 income year?		Yes / No
IT6. Did you have a net rental property loss in the 2018 income year?		Yes / No
IT7. Did you pay child support in the 2018 income year?		Yes / No
IT8. Number of dependent children?		Yes / No
<b>Spouse details (if applicable)</b>		
– Did you have a spouse for the full year from 1 July 2016 to 30 June 2018? If you had a spouse for only part of the income year, please specify the dates between 1 July 2016 to 30 June 2018 when you had a spouse.	From: ...../...../..... To: ...../...../.....	Yes / No
– What was your spouse's taxable income for the 2018 income year?		\$
– 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?		Yes / No
– 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 2018 income year?		Yes / No
– Did your spouse have any reportable fringe benefits amounts for the 2018 income year?		Yes / No
– Did your spouse receive any Australian Government pensions or allowances (not including exempt pension income) in the 2018 income year?		Yes / No
– Did your spouse receive any exempt pension income in the 2018 income year?		Yes / No

