

Individual Tax Returns 2023



Client name:

Please answer ALL questions completely to avoid delays.

1	Personal particulars changed? (Address, relationship status, etc.)	Yes	No
2	Bank details. BSB: _____ Number: _____ Name: _____		
3	Number of dependant children. _____ I/we have _____ N/A		
4	Spouse income, if not already provided. _____ \$		
5	Any earnings from contract work, Uber, eBay, Gumtree, Air BnB etc?	Yes	No
6	Any asset sales during the year. Advise dates of acquisition and disposal, cost and proceeds. This includes crypto currency.	Yes	No
7	Any shares? If so please attach dividend statements if your TFN is not registered on them.	Yes	No
7	Any trust investments? Please attach the current tax statement . (Usually issued Sep/Oct)	Yes	No
8	Do you use your personal vehicle for work?	Yes	No
9	If yes: Have you kept a valid logbook in the last 5 years? 1 July OD reading? 30 June OD reading? Receipts for all expenses?	Yes	No
		Logbook method requirements	Yes
			No
			Yes
			No
	Number of business kms for financial year? _____ c per km method		
10	Do you wear a uniform?	Yes	N/A
	If yes: Is it 'conventional clothing'? eg: black pants, suit, runners, jeans etc (not deductible)	Yes	No
	Is it protective clothing, compulsory uniform with logo, occupation specific, or registered with Aus Industry (deductible)?	Yes	No
11	Self education qualification?	Yes	N/A
	If yes: Does the course improve skills needed for job you had when you started?	Yes	No
	Is it likely to lead to increased income from the job when you started?	Yes	No
12	Did you work from home?	Yes	N/A
	Did you keep a record of all the hours you worked from home for the entire year? (E.G. a timesheet, roster, diary or similar document) Must be answered.	Yes	No
	If yes: What were the total hours worked during the year in your home office?		
13	Did you use your personal mobile or internet for work?	Yes	N/A
	If yes, how much is work related? _____ \$		
	If yes: Have you kept a logbook, or highlighted the work calls on a monthly bill for phone determine the work %? Please ensure the internet log includes use by others.	Yes	No
	Phone: \$ _____ % per records: _____ %		
	Internet: \$ _____ % per records: _____ %		
	(If you cannot substantiate, we can claim up to \$50 per year total phone/ internet/ home office)		
14	Did you make any donations to registered charities? <small>If you have answered yes please provide receipts.</small>	Yes	No
15	For new clients, what was the cost of last years tax return? _____ \$		
16	Have you made a personal contribution to your superannuation that you wish to claim a tax deduction for?	Yes	N/A
	Please advise the additional personal contributions, so we can advise the best amount to claim _____ \$		

Please provide copies of logbooks and receipts. You need to keep these in your files for at least 5 years after the return is lodged.
