

Individual Tax Returns



Client name: _____

1 Do you have any business income? (Eg: ABN work, Uber, Ebay, Gumtree etc) No Yes

2 Do you use your personal vehicle for work? No Yes
 If yes: Have you kept a valid logbook in the last 5 years? No Yes
 1 July OD reading? No Yes
 30 June OD reading? No Yes
 Receipts for all expenses? No Yes
 Logbook method requirements
 Number of business Kms for financial year? _____ c per km method
 (If no to any of the above logbooks questions, we can still claim up to 5,000km p.a.)

3 Do you wear a uniform? No Yes
 If yes: It is 'conventional clothing'? eg: black pants, suit, runners, jeans etc (not deductible) No Yes
 It is protective clothing, compulsory uniform with logo, occupation specific,
 or registered with Aus Industry (deductible) No Yes

4 Self education qualification? No Yes
 If yes: Does the course improve skills needed for job you had when you started? No Yes
 Is it likely to lead to increased income from the job when you started? No Yes

5 Did you work from home? No Yes
 Did you keep a logbook for a 'normal' 4 week period? Or can you supply other
 records that support the hours claimed (work rosters)? No Yes

6 Do you use your personal mobile or internet for work? No Yes
 If yes: Is total claim more than \$50 for the financial year? No Yes
 If yes: Have you kept a logbook, or highlighted the work calls on a bill for 4 'normal' weeks
 to determine the work %? (See Over) No Yes
 What is the exact work % to the nearest %? _____
 (If not, we can claim up to \$50 per year phone/ internet/ home office)

7 Did you make any donations to registered charities? No Yes

Please provide copies of logbooks and receipts. These can be photocopies or digital copies. If you provide originals, we will make copies and return the originals to you. You need to keep these in your files for at least 5 years after the return is lodged.

Signed _____

Date _____