

CLIENT CHECKLIST - 2021/2022

INCOME	YES	NO
• Wages/ Salary (PAYG) _____	☐	☐
• ETPs	☐	☐
• Centrelink	☐	☐
• Interest	☐	☐
• Dividends (Including Employee Share Schemes.)	☐	☐
• Other Investments – (Partnerships/Trusts/Managed Funds, etc.)	☐	☐
• Business Income	☐	☐
• Capital Gains (purchase and sale details – investment property, shares, Crypto etc)	☐	☐
• Foreign Income (Pension, employment, etc.)	☐	☐
• Rental Properties (income and expenses summary	☐	☐
• Forestry Managed Investment Scheme	☐	☐
• Other Income	☐	☐

WORK DEDUCTIONS

• Motor Vehicle (72 Cents per km only) (Log book – current? 4 week diary for Utes (D2))	☐	☐
• Travel	☐	☐
• Uniform / Laundry (Diary evidence?)	☐	☐
• Home Office per hr rate 52 cents (elect, gas & office furniture purchased)	☐	☐
• Home Office per hr rate 80 cents (phone, internet, elect, gas & office furn purchased)	☐	☐
• Home Office – actual cost method - telephone, electricity, office furniture & equipment purchased Require a 4 week diary for phone, computer, etc	☐	☐
• Self Education (Nexus with employment)	☐	☐
• Other (Tools, Union Dues, Professional memberships)	☐	☐

OTHER DEDUCTIONS

• Investment Interest	☐	☐
• Donations (claim up to \$10 made to 'bucket' appeals)	☐	☐
• Managing Tax Affairs	☐	☐
• Superannuation – personal contribution (confirmation received from fund?)	☐	☐
• Income Protection Insurance (not in superannuation fund)	☐	☐

OFFSETS

• Superannuation	
• Spouse Super Contribution	
• Zone	

ADJUSTMENTS

Part year tax free threshold ☐ ☐

OTHER INFORMATION

- Super Co-Contribution (Complete A3 if yes) ☐ ☐
- Private Health Insurance Annual Statement No: _____ Type: _____ ☐
- HECS/SFSS Debt ☐ ☐
- Number of Dependents _____
- Bank Account details for tax refund :Name _____ BSB: _____ Account # _____