

# Benefit / Accounting,

Bookkeeping and Business Services

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Name \_\_\_\_\_  
TFN \_\_\_\_\_  
DOB \_\_\_\_\_  
Current Address \_\_\_\_\_  
\_\_\_\_\_

Last lodged Tax Return copy provided? yes / no

### Bank Account

Acc Name \_\_\_\_\_  
BSB \_\_\_\_\_  
Acc # \_\_\_\_\_

### Income

- Income Statements/Payment Summaries \_\_\_\_\_
- Occupation \_\_\_\_\_
- Employer Termination Payment/s \_\_\_\_\_
- Centrelink Statement \_\_\_\_\_
- Interest Earned \_\_\_\_\_
- Dividend Statement/s \_\_\_\_\_
- Trust/Investment Distributions \_\_\_\_\_
- Superannuation Payment/s if <65yrs (or <60yrs and retired) \_\_\_\_\_
- Other Income/Capital Gains \_\_\_\_\_

### Work Related Deductions

- Car Expenses<sup>1,2</sup> Kms Travelled; or Expenses and % \_\_\_\_\_
- Travel Expenses<sup>1,2</sup> Flights/Transport Accommodation \_\_\_\_\_  
Meals/Consumables \_\_\_\_\_  
Parking/Toll \_\_\_\_\_
- Uniform/Protective Gear<sup>1</sup> \_\_\_\_\_
- Self-Education Expenses<sup>1,3</sup> \_\_\_\_\_
- Other Work Related Expenses<sup>1</sup> \_\_\_\_\_  
Phone/Internet \_\_\_\_\_  
Stationery/Briefcase \_\_\_\_\_  
Home (hrs or \$)<sup>2,7</sup> \_\_\_\_\_  
Tools/Supplies \_\_\_\_\_  
Devices/Other \_\_\_\_\_

### Other Deductions

- Interest/Dividend Deductions<sup>1</sup> \_\_\_\_\_
- Donations<sup>1,4</sup> \_\_\_\_\_
- Cost of Managing Tax Affairs<sup>1,5</sup> \_\_\_\_\_
- Extra Superannuation Contributions<sup>8</sup> \_\_\_\_\_
- Super NOI Form Supplied/Completed<sup>8</sup> \_\_\_\_\_
- Income Protection Insurance \_\_\_\_\_

### Additional Info

- Spouse/De Facto: \_\_\_\_\_  
DOB \_\_\_\_\_  
Taxable Income \_\_\_\_\_
- Number of Dependents \_\_\_\_\_
- Private Health Insurance Statement \_\_\_\_\_
- Other Info \_\_\_\_\_

### Investment Property

- Address<sup>6</sup>: \_\_\_\_\_
- Date Property First Earned Rent<sup>6</sup> \_\_\_\_\_
- Property Management Statement / Rent \_\_\_\_\_
- Property Expenses:<sup>1</sup>
  - Interest on Mortgage \_\_\_\_\_
  - Borrowing Expenses \_\_\_\_\_
  - Rates/Water \_\_\_\_\_
  - Body Corp. \_\_\_\_\_
  - Insurance \_\_\_\_\_
  - Advertising \_\_\_\_\_
  - Cleaning \_\_\_\_\_
  - Pest Control \_\_\_\_\_
  - Lawn Mowing \_\_\_\_\_
  - Repairs and Maintenance \_\_\_\_\_
  - Property Management Fees \_\_\_\_\_
  - Sundry/Other \_\_\_\_\_
- Depreciation Schedule<sup>6</sup> \_\_\_\_\_
- Depreciable Assets bought / disposed: Amount and Date \_\_\_\_\_
- Any Personal Use of property \_\_\_\_\_
- Ownership % (if not 100%) \_\_\_\_\_

### Business Activity and Related Distributions

- ABN \_\_\_\_\_
- Entity: Sole Trader / Partnership / Company / Trust \_\_\_\_\_
- Income/Expenses: Software / Spreadsheet / Docs \_\_\_\_\_
- Figures: Provided / Due Diligence / Doc Collation Required \_\_\_\_\_
- GST Registered: Yes / No \_\_\_\_\_
- Payroll: Yes / No \_\_\_\_\_

### Other Notes

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

<sup>1</sup> Evidence required.

<sup>2</sup> A letter from your employer may be required or during COVID-19.

<sup>3</sup> Education expenses must be relevant to your current job.

<sup>7</sup> Running costs only, i.e. rent, electricity, contents insurance, R&M, cleaning, etc. Claiming occupancy costs, i.e. mortgage interest, rates/water, building insurance, dephn, may attract CGT upon sale.

<sup>4</sup> Donations over \$2 are claimable. Not raffle tickets etc.

<sup>5</sup> Can claim travel, parking, etc to visit accountant/bookkeeper.

<sup>6</sup> Prior Tax Return may have this info.

<sup>8</sup> A *Notice of intent to claim a deduction* form must be sent to the super fund within time and an acknowledgement received. Not applicable for reportable employer super contributions or salary sacrifice.