TIG BENDIGO

Tax Return Checklist

Tax Integrity Group Bendigo has designed this checklist to cover the documentation and information needed to complete your tax return. This checklist will assist you in gathering and providing us the required information at tax time.

Personal details

If you are a new client please complete the whole checklist (if applicable). If you are an existing client please complete your name, TFN and any personal details that have changed.

First name			
Surname			
Date of Birth			
Tax File Number			
Resident	*Yes* ◯ *No* ◯ *If, No please provide the visa copy*		
Residential Address			
	Suburb	*State*	*Postcode*
Email Address			
Phone Number			
Preferred Method of Communication	*Email*	*Phone*	*Other*
Occupation			
Marital Status	*Single* ☐	*Married / De-facto* ☐	*Separated* ☐
Dependents	*Yes* ◯	*No* ◯	*Number (if yes)*
Bank details (to transfer tax refund if applicable)	*BSB*	*Account Number*	*Account Name*

Spouse details (if applicable)

First name	
Surname	
Date of Birth	
Tax File Number	
Taxable income (If we are not completing their tax return this year)	

Income:	Yes	No	Income:	Yes	No
PAYG summaries	◯	◯	Forest Managed	◯	◯
Allowances	◯	◯	PSI	◯	◯
Lump Sum A or B	◯	◯	Business Income	◯	◯
ETPs	◯	◯	Deferred Business losses	◯	◯
Centrelink Benefits	◯	◯	Farm Management Dep	◯	◯
Pensions	◯	◯	Capital Gains	◯	◯
Annuities & Super income streams	◯	◯	Foreign Entities	◯	◯
Superannuation Lump sum payments	◯	◯	Foreign Income	◯	◯
Attributed PSI	◯	◯	Rental Income	◯	◯
Gross Interest	◯	◯	Life Ins. & Friendly Soc	◯	◯
Dividends	◯	◯	Employee share scheme	◯	◯
Managed Funds, Trusts etc	◯	◯	Other Income	◯	◯
Job Keeper	◯	◯	Taxi/Uber Income	◯	◯
Shares	◯	◯	Crypto	◯	◯

Deductions

D1 – Motor Vehicles: *cannot claim motor vehicle, if salary sacrifice or novated lease*

Cents per KM Yes ◯ No ◯	Log book Yes ◯ No ◯	If Yes, please complete the Cents per Km worksheet or Log book worksheet

D2 – Work related Travel expenses

Parking $	Taxi/Uber $	Tolls $	Airfares $
Train $	Accommodation $	Conference Seminars $	Interstate Meals $
Incidentals $	Hire car $		

**Please provide receipts.*

D3 – Work Clothing

Laundry(upto $150) $	Non – Compulsory uniform $	Occupation specific clothing $
Dry cleaning $	Protective footwear $	Protective clothing $
Safety vest $	Compulsory uniform $	Other $

**Please provide receipts.*

TIG BENDIGO

D4- Self-education Expenses relating to current occupation

Name of the course			
Name of the institute			
Course fee $	Student fee $	Home study hours	Stationery $
Laptop / desktop $	Library fee $	Books / printing $	Internet $
Travel between the institute & work place - kilometers			
Details of the trips			

D5 – Other work Expenses

Union Fee $	Conference $	Journals $	Interest Charges $
Subscription $	Facemask/sanitizer $	Depreciation $	Membership $
Tool/equip. $	Software $	Seminars $	Sun Protection $
Overtime meal (only if allowance at item 2) $	Mobile Phone $ (Per month bill)	Internet $ (Per month bill)	Safety Glasses $
Sun glasses $	Stationery $	Hard Hats $	Other $

Work from home period:

Period Start:	Period End:
Hours per week:	Total hours:

Home office setup cost:

Description (e.g.: table/chair):	Amt:
Description:	Amt:
Description:	Amt:

D8 – Dividend/Investment related deductions

Journals and Subscriptions $	Management Fees $	Interest $	Financial $ Advisor (Not initial fee)

D9 – Donations, Voluntary school building funds, or gifts to political parties

Name of Organization:		
Donations $	Building Funds $	Gifts $

*Please provide receipts

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D10 – Cost of managing tax affairs

Tax agent fee:	Travel cost to tax agent/KM:

D12 - Personal Superannuation Contributions Yes ○ No ○

Please make sure you have a Notice of intention to claim a tax deduction confirmation letter from the Superannuation Fund. A deduction cannot be claimed if the client has not notified their fund of their intension to claim AND received a confirmation from the fund.

D15 – Other deductions

Income Protection Insurance $	Foreign Exchange Losses $
Losses related to PSI $	Other $
Interest on loans for foreign rental properties (only if registered suith ATO) $	

Please note:

Private health insurance *(important due to ATO requirements)*

Do you have private health insurance with full hospital cover? Yes ◉ NO ○

If yes, please ensure you provide a private health insurance statement for the financial year.

**If you do not have a private health insurance, please ensure you fill out the spouse details section & list the number of dependents you have.*

**Rental worksheet and Motor vehicle expense worksheet attached.*

**Please email the filled form along with relevant documents to hello@taxintegritygroup.com.au Alternatively, bring in the filled form on the appointment day with other documents.*