

Tax Return Checklist

Telephone: 0410 158860

www.mytaxagent.com

e-mail: ashley@mytaxagent.com

Name:

Date of Birth

Residential
Address:

Suburb

Post Code

Postal Address

As Above

Postal Address:

Postal Suburb

Post Code

Mobile Phone

Other Phone

e-mail Address

Year of Return

Occupation:

As the ATO will no longer issue refund cheques, you must provide your account details below:

Branch BSB

Account Number

Account Name

Income Details

1. Income Statements (PAYG Payment Summaries)

Total number for processing

Salary and Wages, Paid Parental Leave, Youth Allowance, Newstart, Sickness Allowance, Pensions, Super Benefits, Allowances, Termination Payments, Lump Sum Payments

2. Interest received from banks or building societies

Nil Interest

Bank	Account Number	Your Share of Interest	Tax Withheld by Bank
Bank	Account Number	Your Share of Interest	Tax Withheld by Bank
Bank	Account Number	Your Share of Interest	Tax Withheld by Bank

3. Other Income

Dividends, Managed Funds, Foreign Interest,
Share Sales, Rental / Business Income etc

Number of Documents attached

Further
Information
or Details

Please include details of any COVID or Disaster payment received


Deductions and Expenses

Please remember if you are salary sacrificing any expenses you can NOT claim a tax deduction

1. Car Expenses - Not including 1 Tonne Utes / Vans / Motorcycles


[Click here for ATO Information](#)

There are two ways to claim:

a) You can claim up to 5000km based on 78 cents per km 

How many business kms did you travel

(Please include the Make & Model below)

b) You can use the **Logbook Method**, where a complete and correct logbook has been kept 

Please enter your logbook percentage:

Please detail all expenditure:

Other Travel
Expense
Details

2. Uniform Expenses

[Click here for ATO Information](#)

Laundry claims are based on 50c per load when washing uniform items with other clothes, or \$1 per load when washing separately. Calculate your claim by using the weeks worked, and the number of loads - maximum \$150.
E.g. 48 weeks x 2 loads x \$1 (washed separately) = \$96 **Please account for Covid-19 changes**

Please list details and amounts

3. Other Work Expenses

E.g. Sun Protection, Union Fees, Phone, Self Education, Home Office, Stationery, Subscriptions, Seminars, Books, Internet etc

Please list details and amounts

4. Gifts and Donations

Please list details and amounts

5. Other Deductions

E.g. Tax Agents Fees, Income Protection Insurance, Investment Loan interest etc
*** Remember you may now be able to claim after tax super contributions ***

Please list details and amounts

Other Important Information

Private Health Insurance

Please attach your end of year statement if you received one from your fund.

HELP debt

SFSS debt

Spouse & Children's Details:

Together all year?

Yes
No

If "No" Date Separated

Spouse Name

Spouse Date of Birth

Taxable Income

Reportable Fringe Benefits

Reportable Super

Investment / Rental Loss

Please provide your Children's name, current age at 30 June, and total income earned

Further Information

Please provide details of any further information that may be relevant to your tax return *Attach information as required*

Child Support

I have made a payment

Amount Paid

I declare that I have disclosed all income received for the financial year, and any claims for deductions included satisfy the relevant taxation legislation as I understand it:

Full Name

Date

Important: The ATO can request copies of all receipts, Internet / car logs, and calculations (telephone etc), within 48 hours of lodgement. Please ensure your receipts and documents are organised *prior to lodging your return.*

Please indicate your preferred method of contact:

For Questions

e-mail
SMS

For Signing

e-mail
Post

Save your document using "Save As" under the File menu, and use your full name (ashleycarter.pdf)