

2021 PERSONAL INCOME TAX RETURN CHECKLIST

We have provided you with this checklist to assist in gathering all your information for us to complete the 30 June 2021 income tax return.



Please return the completed checklist with the required information (not original documentation - copies only) to our office or via email.

Information Required	Information Provided	Not Applicable
INCOME		
PAYG Payment Summary from Employers: Include ETP's, Payment Summaries from Centrelink and Superannuation Pensions What is your main occupation? _____	<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>
Interest Received: Provide details of the financial institution including the account name, number and total TFN deducted	<input type="checkbox"/>	<input type="checkbox"/>
Dividends received: Copies of dividend advice – include dividends re-invested as DRPs	<input type="checkbox"/>	<input type="checkbox"/>
Trust & Partnership Distributions (including managed funds): Provide copies of trust and partnership annual 2021 taxation summary statements	<input type="checkbox"/>	<input type="checkbox"/>
Capital Gains/Losses: If you have made Capital Gains or Losses on Property, Shares, Cryptocurrency (such as Bitcoin) or Other Investments (Australia & Overseas), please provide the contract and settlement statements for all purchases & sales (include all associated costs, e.g., legal costs, agent's commissions) Have you sold your main residence during 2021? Yes <input type="checkbox"/> No <input type="checkbox"/> Have you sold any pre-CGT assets (purchased pre- 20 Sept 1985) during 2021? Yes <input type="checkbox"/> No <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Foreign Income: Details of overseas income (eg wages, interest, pensions, rental income and other – include any tax paid)	<input type="checkbox"/>	<input type="checkbox"/>
Other Income: eg. Business income, primary production (including stock on hand as at 30 June), foreign exchange gains & shares from employee share schemes.	<input type="checkbox"/>	<input type="checkbox"/>
RENTAL PROPERTY: Please complete our Rental Property checklist for each rental property. If you purchased or sold any property during the year, please complete page 2 of our Rental Property checklist	<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>
DEDUCTIONS		
Motor Vehicle Expenses: <i>If the motor vehicle was purchased during the year, please provide documents to support the purchase price and finance (if applicable).</i> If you keep a log book, please provide details/receipts for the following expenses: Registration \$ _____ Insurance \$ _____ Fuel \$ _____ Repairs \$ _____ Leasing expenses \$ _____ Please also provide a copy of your logbook. <i>Note: Logbooks completed from the 2016/2017 year or later, can be used in the 2020/2021 year. A logbook is only valid for 5 years.</i> If you did not keep a log book, the above is not required. Instead provide the number of business kms travelled during the year: Kms Travelled _____ km	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Travel Expenses: Provide a summary of expenditure incurred including airfares, accommodation, meals, taxi, parking and incidentals as well as how the travel was related to your employment income.	<input type="checkbox"/>	<input type="checkbox"/>
Other Work Expenses: eg. Union fees, subscriptions, membership fees, computer expenses, mobile phone, internet, tools, books, journals, seminars, sun protection products. If you are claiming a deduction for something used partly for business and partly for private, you can only claim the part that relates to business use.	<input type="checkbox"/>	<input type="checkbox"/>
Mobile phone & internet: If you occasionally use your mobile phone and internet for work purposes, you can claim up to \$50 without having to keep diary entries. To claim a deduction of more than \$50, you need to keep records for a four-week representative period in each income year. These records may include diary entries, including electronic records, and bills.	<input type="checkbox"/>	<input type="checkbox"/>
Self-Education (The deductions must have a connection to your current employment): e.g. Depreciation of computer (apportioned), text books, student union fees, course fees, stationery & travel expenses. You cannot claim contributions or repayments that are made under HECS-HELP, FEE-HELP, OS-HELP or SFSS.	<input type="checkbox"/>	<input type="checkbox"/>

Number of dependent children under 21, and/or children who were dependent full-time students under 25 in 2021? _____	<input type="checkbox"/>	<input type="checkbox"/>
Did you receive a tax-free government pension? (please provide details)	<input type="checkbox"/>	<input type="checkbox"/>
Did you pay or receive any child support? (please provide details)	<input type="checkbox"/>	<input type="checkbox"/>
<p>Your Name: _____</p> <p>THE ATO WILL NO LONGER ISSUE REFUNDS VIA CHEQUE. PLEASE PROVIDE YOUR EFT DETAILS TO ENABLE ANY REFUND TO BE BANKED DIRECT INTO YOUR BANK ACCOUNT.</p> <p>BSB: _____ Account No. _____ Account Name: _____</p>		