

# 2023

## INCOME TAX RETURN CHECKLIST



Incorporating  
Blackwood Tax & Accounting

### YOUR DETAILS

Are you a permanent resident of Australia? YES  NO  If no, what date did you apply for residency?

Tax File Number (TFN)

Australian Business Number (ABN)

Mr  Mrs  Miss  Ms  Dr  Other

Occupation

Full Name

Residential Address

Postal Address *(if different to above)*

Date of Birth

Phone

Mobile

No. of Dependants

Email

Financial Institution

Account Name

BSB No.

Account No.

### SPOUSE DETAILS

Name

TFN

Date of Birth

No. of Dependants

Occupation

Taxable Income \$

Reportable Fringe Benefits \$

Reportable Super \$

Rental Loss \$

### PRIVATE HEALTH INSURANCE

Fund Name

Member No.

No. of Dependant Children

Date Covered

Level of Cover *combined, hospital or extras*

### NOTES

## INCOME

PAYG Payment Summaries *attach summaries* YES  NO

Number of Employers

Pensions / Superannuation / Government Allowances & Payments *attach summaries* YES  NO

Interest earned on Bank Accounts *attach statements* YES  NO

Bank	Account No.	Amount	Tax Withheld
		\$	\$
		\$	\$
		\$	\$
		\$	\$

Do you have any Foreign Income? *attach statements* YES  NO

Do you have any Shares? *attach statements* YES  NO

Do you have any Cryptocurrency? *attach statements* YES  NO

Dividends Received *attach statements* YES  NO

Trust / Partnership Distribution Received *attach annual tax statement* YES  NO

Business Income *attach statements* YES  NO

### Asset Sales

Did you sell shares, investments or property this year? YES  NO

*please supply all relevant documentation ( e.g. CommSec Trading Account, Property Settlement Statement)*

Rental Property Income *statements attached (e.g. Rental Summary)?* YES  NO

	Rental One	Rental Two	Rental Three
Gross Income	\$	\$	\$
Assets (e.g. air conditioner)	\$	\$	\$
Admin & Management Fees	\$	\$	\$
Body Corporate (STRATA Fees)	\$	\$	\$
Council Rates	\$	\$	\$
ESL	\$	\$	\$
Insurance	\$	\$	\$
Interest	\$	\$	\$
Land Tax	\$	\$	\$
Repairs & Maintenance	\$	\$	\$
Water	\$	\$	\$
Other	\$	\$	\$

## DEDUCTIONS

Motor Vehicle Travel *travel between places of employment, not including trips between home and work.*

Have you kept a Logbook YES  NO  *please attach copy*

If no, please provide a reasonable estimate of business KMs travelled (*maximum of 5,000kms*) @ 78c/km

If yes, please complete the section below and provide the business use percentage %

Vehicle - Make, Model & Reg No.

Fuel \$	Tyres/Battery \$	Insurance \$	Registration \$
Services/Repairs \$		Interest/Lease Payments \$	

Odometer Reading at 30 June

Other

Work Related Travel *includes travel costs, meals, accommodation, parking & incidentals etc.*

Details	Amount	Business
	\$	%
	\$	%
	\$	%
	\$	%

Was the duration longer than six (6) nights YES  NO  If yes, did you keep a travel diary? YES  NO  *please attach copy*

Laundry / Uniforms / Protective Clothing

Details	Amount
	\$
	\$

Seminars / Conferences / Study & Exam Expenses

Details	Amount
	\$
	\$
	\$

Gifts or Donations *charities, school building funds etc.*

Organisation	Amount
	\$
	\$
	\$

Accounting Fees / Tax Agent Fees

Firm Name	\$
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Capital Items Purchased *work related office equipment, computer, phone etc.*

Details	Amount	Business Use
	\$	%
	\$	%
	\$	%
	\$	%

**Home Office Expenses - From July 1st 2023**

A detailed record will need to be documented of actual time spent, please contact us for a diary template

Hours spent per week x weeks @ 67c/hour

Phone / Internet *mobile and landline*

Details	Amount	Business Use
	\$	%
	\$	%

Stationery / Photocopying / Repairs & Maintenance of Equipment

Details	Amount	Details	Amount
	\$		\$
	\$		\$

Professional Memberships / Subscriptions *professional registrations, PI insurance, union fees etc.*

Details	Amount	Details	Amount
	\$		\$
	\$		\$
	\$		\$

Personal Risk Insurance *statements attached?* YES  NO

Type	Insurer	Policy No.	Premium Paid
Life Insurance			\$
Total & Permanent Disability			\$
Income Protection			\$

Personal Super Contributions

*Please provide a Notice of Intent to claim AND acknowledgment from the fund*

Fund Name	Fund ABN	Account No.	Amount
			\$
			\$