

# TAX RETURN CHECKLIST FOR YEAR ENDED 30 JUNE 2017

**Note:** If Platinum Accounting & Taxation have not prepared your return previously, please attach a full copy of your previous year's tax return and any other relevant information from previous years.

- If you own a rental property, please refer to our **Rental Property Schedule**

PERSONAL DETAILS		
Name:	Occupation:	
Phone No:	Mobile:	
Your Tax File Number:	Your Date of Birth:	
Email Address:		
Home Address:		
Postal Address:		
Full Name of Spouse:	Spouses Date of Birth:	
Date of Marriage (if married during the year):	Spouse Taxable Income 2017:	
<i>If Platinum Accounting &amp; Taxation is not preparing your partners tax return, please provide us with their taxable income as their income may be required to be recorded <b>in your</b> tax return.</i>		
<b>Your Bank Account Details</b> (to receive any tax refund electronically)		
<b>BSB (Must be 6 digits)</b>	<b>Account Number</b>	<b>Account Name</b>

## INCOME DETAILS

1. **PAYG Payment Summaries** (including pensions & Centrelink)  Yes  No

Number of summaries attached: \_\_\_\_\_

2. **Other Salary Income** (includes any directors' fees, commissions, tips etc.)

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3. **Termination Payments** (if you received a lump sum termination payment please provide Eligible Termination Statement – ETP Statement)

Applicable?

Yes  No

4. **Interest** (money received on your bank accounts)

Name of Bank	Account No.	Total Interest Received	TFN Withholding	Joint Account?
				<input type="checkbox"/> Yes <input type="checkbox"/> No
				<input type="checkbox"/> Yes <input type="checkbox"/> No

5. **Dividends**

**Please provide copies of dividend statements of income received.** Also note that if on the dividend reinvestment plan (DRP) which means you don't physically receive dividends (the company uses that money to buy you more shares) that is still income and must go into your tax return.

Name of Shares	No. Shares Held	Amount Received

## INCOME DETAILS

**6. Trusts Distributions and Partnership Income** (i.e. examples of trusts are public funds or unlisted/family trusts). Name of trust or partnership – Please provide documents including yearend Tax Statements to show income from the funds you list.

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**7. Capital Gain** – Did you sell any assets such as shares or property which were acquired after 20 September 1985? If yes, then please attach documentation of when it was purchased, its cost, and any documents relating to its sale or the funds received. You can also download a form from our website.

Applicable?  Yes  No

**8. Rental Income** – Please attach **details** of the rent received and all expenses in their separate categories. A Rental Property Schedule is available from our website for your convenience.

Please supply settlement sheets and purchase documents for properties if applicable.

Should you require the services of a Quantity Surveyor for a depreciation report please contact us for a referral of the firm we use.

List of rental properties, all information attached:

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**9. Foreign Income**

Did you receive foreign income/salary? – please attach all relevant documentation.  Yes  No

Did you receive any Foreign Dividends? If yes, please provide statements.  Yes  No

**10. Any Other Income** (Any other income you received in the financial year which doesn't fit into any of the above categories – please provide details.

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## DEDUCTION DETAILS

**Please ensure you are able to substantiate all claims.**

**1. Motor Vehicle** – Were you required to use your own car for business/work purposes during the year?  Yes  No

If yes, then please provide information for either (a) or (b) below.

**(a) Log Book Method:** What is the business % use per your logbook? \_\_\_\_\_

You must keep a logbook for a minimum of period of 12 continuous weeks and it must be less than 5 years old. Ensure you have **all** expense receipts.

Please provide details of all expenses you incurred over the financial year under the following categories:

Expense Type	Amount
Fuel (please keep all receipts)	
Insurance	
Registration	
Services/Repairs/Tyres	
Loan Interest or lease payments (if applicable) – if you have hire purchase or lease please attach the paperwork	
Other – please specify:	
Cost of vehicle: <span style="float: right;">Date of purchase:</span>	

**(b) Cents per kilometer method:** How many business kilometres did you travel during the year (up to 5000 kms) Kilometres? Please ensure you can justify your claim with explanatory diary records:

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## DEDUCTION DETAILS

### 2. Work Uniform

Do you wear a logo uniform or require protective clothing?

Yes  No

If yes, please provide the costs associated with purchasing and maintaining the uniform, e.g. laundry (up to \$150 without receipts, but with justification) cost of protective clothing such as work boots, sunscreen, hats, eye protection. **You must have all receipts.**

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### 3. Donations

Yes  No

Name of Body	Amount

4. **Tax Agent Fees** (from previous year, 2016 FY): \_\_\_\_\_

### 5. Interest & Dividend Deductions

Description	Amount
Interest on dividend or other investment income	
Cost of investment advisor	
Reference Materials	
Other – please specify:	

### 6. Other Work-Related Deductions – please provide details and ensure you have kept **all** receipts.

Description	Amount
Diary, stationery, work materials	
Union Fees / Professional Body Memberships	
Mobile phone (total cost per month x work-related %)	
Tools and equipment (costing \$300 or less, only)	
Tools and equipment (costing more than \$300) Please attach all documents/receipts so we can depreciate.	
Seminars & short courses	
Income protection insurance (note: life insurance is not tax deductible)	
Subscriptions	
Other – please specify:	

## DEDUCTION DETAILS

### 7. Home Office Expenses

For each applicable claim, please describe your **reason** for claiming and show **how you have calculated** the amount.

Use of **internet access** for work purposes

Use of **home phone** for work purposes

How many hours per week do you spend working at home? You must be able to provide a 4-week representative diary log in an audit situation. Please exclude annual leave and sick days.

If you would prefer to claim a portion of the work-related portion of your electricity & gas expenses, please tick this box and we will contact you to discuss the information required  Yes  No

Please list any computer equipment or office furniture purchased during the year July 2016 – June 2017:

Description	Date of Purchase	Cost	Work-related %

### 8. Work Related Travel Expenses

**8a. Please detail local travel for work purposes** i.e. taxis, public transport, tolls and parking, car hire fees.

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**8b. International / interstate / interstate trips for work purposes** i.e. airfares, accommodation, meals and incidentals, taxi fares, visa application fees. *Please note:* You must keep a travel log book for trips of 6 or more consecutive nights.

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9. **Other** (Any costs that were directly related to your job – please provide details)

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10. **Self-education** Expenses include seminar costs, text books, stationery, student union fees, course fees (except HECS/HELP), depreciable items used for self-education purposes e.g. Computer, Reference library.

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Please advise the connection between your course/ studies and your **current** employment.

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## TAX OFFSETS & REBATES

1. **Do you have private health insurance?**

Yes  No

If yes, please provide us with a copy of the health fund statement.

2. **Superannuation**

(a) Are you self-employed, if yes please provide details of contributions you made to your superannuation for the financial year.

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(b) Have you made any personal contributions to your superannuation fund? If so you may be entitled to super co-contributions (conditions apply). We do not require any information for your tax return as the process to claim this is automatic between the Australian Taxation Office and your superfund upon lodgment of your tax return.

Yes  No

(c) Have you made superannuation contributions on behalf of your spouse?

Yes  No

