

TAX RETURN CHECKLIST FOR YEAR ENDED 30 JUNE 2021

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 2021:	
<i>If Platinum Accounting & Taxation is not preparing your partners tax return, please provide us with their taxable income as their income may be required to be recorded in your tax return.</i>		
Your Bank Account Details (to receive any tax refund electronically)		
BSB (Must be 6 digits)	Account Number	Account Name

INCOME DETAILS

- 1. Payment Summaries/Income Statements** (including pensions & Centrelink) Yes No

How many Payment Summaries / Income Statements do you have for 2021 financial year? _____

It's important to wait until your employer finalises your income statement to make it 'tax ready' before we lodge your tax return.

Most employers have until 31 July to finalise your income statement for the year.

- 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**

Did you receive dividends during the 2020/2021 financial year? Yes No

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.

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, cryptocurrency, vacant land or investment properties 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:

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 including cryptocurrency - 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 can 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) Logbook 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: Date of purchase:	

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

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.**

3. Donations

Yes No

Name of Body	Amount

4. **Tax Agent Fees** (from previous year, 2020 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 and diary records.

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, including Working from home due to COVID-19

Please complete all questions below where possible.

(i) Were you required to work from home due to COVID-19? Yes No

(ii) Did you undertake work activities from home for reasons other than COVID-19 lockdown restrictions? Yes No

(iii) How many **days or weeks** did you work from home? Please exclude annual leave and sick days. You must be able to provide a 4-week representative diary log in an audit situation.

Total days worked from home between 01 July 2020 – 30 June 2021 _____

or

Total weeks worked from home between 01 July 2020 – 30 June 2021 _____

(iv) How many hours did you typically work from home per day or week? Provide extra details if needed.

Hours per day: _____

Hours per week: _____

(v) Were you required to use your own **internet connection** to perform your work? Yes No

Cost of internet per month: _____

Your work-related portion of internet usage, as a percentage or a dollar value: _____

How many people in your household were using the internet connection concurrently? Please detail.

(vi) There are three methods available to work out your 'work from home' tax deduction. One of these methods requires you to **provide your gas and electricity bills** incurred during 01 July 2020 – 30 June 2021.

Total **gas** costs incurred during 01 July 2020 – 30 June 2021: _____ (or attach all bills)

Total **electricity** costs incurred during 01 July 2020 – 30 June 2021: _____ (or attach all bills)

How many people in your household were home whilst you were working from home? Please detail.

Please list any computer equipment or office furniture purchased during the year July 2020 – June 2021 and/or supply receipts:

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 logbook for trips of 6 or more consecutive nights.

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, textbooks, 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 – new rules

(a) From 1 July 2017 individuals may claim a tax deduction for personal contributions made into super.

Did you make a super contribution into a complying superannuation fund between 01 July 2020 and 30 June 2021?

No

Yes

• Amount contributed to super _____

• Have you given a **valid written notice** in the approved form to your receiving super fund? Yes No

• Has your receiving super fund provided you with a written acknowledgement of your notice? Yes No

(b) Have you made any personal, after-tax, contributions to your superannuation fund? If so, you may be entitled to super co- contributions of up to \$500 (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

