



TAX RETURN CHECK LIST

INCOME

- ☐ Salary or wages
- ☐ Allowances, earnings, tips, director's fees etc
- ☐ Employer lump sum payments
- ☐ Employment termination payments
- ☐ Australian Government allowances and payments like Newstart, youth allowance and austudy payment
- ☐ Australian Government pensions and allowances
- ☐ Australian annuities and superannuation income streams
- ☐ Australian superannuation lump sum payments
- ☐ Attributed personal services income
- ☐ Gross Interest
- ☐ Dividends
- ☐ Employee share schemes
- ☐ Distributions from partnerships and/or trusts
- ☐ Personal services income (PSI) income or loss from business (as a sole trader)
- ☐ Deferred non-commercial business losses
- ☐ Net farm management deposits or repayments
- ☐ Capital gains
- ☐ Foreign entities:
- ☐ Direct or indirect interests in a controlled foreign company
- ☐ Transfer of property or services to a non-resident trust
- ☐ Foreign source income (including foreign pensions) and foreign assets or property
- ☐ Rent
- ☐ Bonuses from life insurance companies or friendly societies
- ☐ Forestry managed investment scheme income
- ☐ Other income

DEDUCTIONS

Work related car expenses

- ☐ Cents per kilometre method (up to a maximum of 5,000 kms)
- ☐ Log book method
- ☐ One-third of actual expenses method
- ☐ 12% of actual cost method

**Work related travel expenses**

- ☐ Employee domestic travel with reasonable allowance
- ☐ If the claim is more than the reasonable allowance rate, do you have receipts for you expenses?
- ☐ Overseas travel with reasonable allowance
- ☐ Do you have receipts for accommodation expenses?
- ☐ If travel is for 6 or more nights in a row, do you have travel records? (e.g. a travel diary)
- ☐ Employee without a reasonable travel allowance
- ☐ Did you incur and have receipts for airfares? Did you incur and have receipts for accommodation?
- ☐ Do you have receipts for hire cars (if applicable)?
- ☐ Did you incur and have receipts for meals and incidental expenses?
- ☐ Do you have any other travel expenses?
- ☐ Other work-related travel expenses (e.g., a borrowed car)

Work related uniform and other clothing expenses

- ☐ Protective clothing
- ☐ Occupation specific clothing
- ☐ Non-compulsory uniform
- ☐ Compulsory uniform
- ☐ Conventional clothing
- ☐ Laundry expenses (up to \$150 without receipts)
- ☐ Dry cleaning expenses
- ☐ Other claims such as mending/repairs, etc (please specify)

Work related self-education expenses

Course taken at educational institution:

- ☐ Union fees
- ☐ Course fees
- ☐ Books, stationery
- ☐ Depreciation
- ☐ Travel
- ☐ Other (please specify)

Other work related expenses

- ☐ Home office expenses
- ☐ Computer and software
- ☐ Telephone/mobile phone
- ☐ Tools and equipment
- ☐ Subscriptions and union fees
- ☐ Journals/periodicals
- ☐ Depreciation



- ☐ Sun protection products (i.e., sunscreen and sunglasses)
- ☐ Seminars and courses not at an educational institution:
- ☐ Any other work related deductions (please specify)

Other types of deductions

- ☐ Low value pool deduction
- ☐ Interest deductions
- ☐ Dividend deductions
- ☐ Gifts or donations
- ☐ Cost of managing tax affairs
- ☐ Deductible amount of undeducted purchase price of a foreign pension or annuity

Other types of deductions

- ☐ Personal superannuation contributions
- ☐ Deduction for project pool
- ☐ Forestry managed investment scheme deduction
- ☐ Other deductions (please specify)
- ☐ Tax losses of earlier income years

Tax offsets/rebates – Please provide evidence

- ☐ Do you have a dependent spouse born on or before 30 June 1952?
- ☐ Are you a senior Australian or pensioner?
- ☐ Did you receive an Australian superannuation income stream?
- ☐ Did you make superannuation contributions on behalf of your spouse?
- ☐ Did you live in a remote area of Australia or serve overseas with the Australian defence force or the UN armed forces in 2013?
- ☐ Did you have net medical expenses over \$2,120 in 2013?.
- ☐ Did you maintain an invalid or carer dependant including your spouse, parent, Parent-in-law, your or your spouse's child, brother or sister aged over 16 years old?
- ☐ Are you entitled to claim the landcare and water facility tax offset?
- ☐ Are you a mature age worker born before 1 July 1957 with 'net income from working' of less than \$63,000?
- ☐ Other non-refundable tax offsets (please specify)
- ☐ Other refundable tax offsets (please specify)



Other relevant information

Medicare levy and Medicare levy surcharge

- ☐ Are you entitled to the Medicare levy exemption or reduction
- ☐ For the entire income year, were you and all of you dependants (including your spouse) covered by the appropriate private health insurance hospital cover?
- ☐ Were you under the age of 18 on 30 June 2015?
- ☐ Did you become an Australian tax resident at any time during the 2015 income year?
- ☐ Did you cease to be an Australian tax resident at any time during the 2013 income year?
- ☐ Did you make a non-deductible (non-concessional) personal super contribution in 2013
- ☐ Did a trust or company distribute income to you in respect of which family trust ?
- ☐ Did you pay any tax within 14 days before the due date (e.g., HECS/HELP)?