

# PERSONAL TAX RETURN CHECK LIST

FULL NAME: \_\_\_\_\_

TFN: \_\_\_\_\_

DOB: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

CONTACT: \_\_\_\_\_

DEPENDENTS NAME(S) & DOB: \_\_\_\_\_

\_\_\_\_\_

SPOUSE NAME & DOB: \_\_\_\_\_

SPOUSE TAXABLE INCOME: \_\_\_\_\_

PRIVATE HEALTH INSURANCE:

FUND: \_\_\_\_\_

MEMBER NO: \_\_\_\_\_

FINANCIAL INSTITUTION FOR REFUND:

ACCOUNT NAME: \_\_\_\_\_

BSB: \_\_\_\_\_

ACCOUNT NO: \_\_\_\_\_

## **INCOME**

- GROUP CERTIFICATE(S)
- TERMINATION PAYMENTS (ETP)
- GOVERNMENT ALLOWANCE & PAYMENTS  
(NEUSTART, YOUTH ALLOWANCE, AUSTUDY)
- GOVERNMENT PENSIONS AND ALLOWANCES
- ANNUITIES AND SUPERANNUATION STREAMS
- SUPER LUMP SUM PAYMENTS
- BANK INTEREST EARNED
- DIVIDENDS
- EMPLOYEE SHARE SCHEMES
- PARTNERSHIP/TRUST DISTRIBUTION
- PERSONAL SERVICES INCOME (PSI)
- BUSINESS INCOME/(LOSS)
- CAPITAL GAINS
- FOREIGN INCOME
- RENTAL INCOME
- FORESTRY MANAGED INVESTMENT SCHEME INCOME
- FARM MANAGEMENT DEPOSITS OR REPAYMENTS
- OTHER INCOME

## **DEDUCTIONS**

- WORK RELATED CAR EXPENSES
- WORK RELATED TRAVEL
- WORK RELATED UNIFORM, LAUNDRY, PROTECTIVE CLOTHING
- WORK RELATED SELF EDUCATION
- OTHER WORK RELATED EXPENSES

- INTEREST DEDUCTIONS
- DIVIDEND DEDUCTIONS
- DONATIONS
- COST OF MANAGING TAX AFFAIRS
- PERSONAL SUPER CONTRIBUTIONS
- PROJECT POOL DEDUCTIONS
- FORESTRY MANAGED INVESTMENT SCHEME DEDUCTIONS
- PARTNERSHIP/TRUST DISTRIBUTION DEDUCTIONS
- BUSINESS DEDUCTIONS
- ASSET DEPRECIATION
- RENTAL EXPENSES
- CARRIED FORWARD LOSSES
- OTHER DEDUCTIONS

**TAX OFFSETS**

- DEPENDENT SPOUSE
- SENIOR AND PENSIONERS OFFSET
- AUSTRALIAN SUPER INCOME STREAM OFFSET
- SUPER CONTRIBUTIONS ON BEHALF OF YOUR SPOUSE
- REMOTE LOCATION ZONE OFFSET
- NET MEDICAL EXPENSES

**OTHER**

- HECS/HELP DEBT
- CHILD SUPPORT YOU PAID