|  |  |
| --- | --- |
| **Individual Tax Return Checklist** | |
| **Customer Personal Information Sheet**  **\*All information provided will be kept confidential** | |
| Family Name |  |
| First Name |  |
| Middle Name |  |
| Gender |  |
| Occupation |  |
| Date of birth |  |
| Address |  |
| Email |  |
| Mobile |  |
| Tax file number |  |
| Bank BSB number |  |
| Bank Account number |  |
| Did you have a spouse for the full financial year? |  |
| Spouse's name (Capital Surname) |  |
| Spouse's DOB |  |
| Spouse's Estimated taxable income |  |
| Number of dependent children |  |
| Are you Australian permanent resident or citizen during the whole financial year? |  |
| How many weeks/months do you work in this financial year? (01/07/2022 to 30/06/2023) |  |

I authorise Solution In to add me to its tax agent portal and act as my tax agent and understand that I must keep written evidence for **5 years** from the date my tax return is lodged.

Signature: Date: \_\_\_\_\_\_\_\_\_\_\_\_\_

| **Summary of Tax Deductable Expenses**  **If the expenses have been reimbursed by your employer, please do NOT include them here.** | | |
| --- | --- | --- |
| **Work Related Expenses** | **Amount** | **Work portion of the cost %** |
| Total work from home hours  (01/07/2022 to 30/06/2023) |  | N/A |
| Work related self-education expense (not your education cost before you start the job), please specify |  | N/A |
| Do you use your own car for work-related purpose?  If so, please specify the number of work-related kms.  Note Daily commuting is NOT work-related travel. |  | N/A |
| Estimated uniform laundry times for the whole year  (Uniforms should be with employer’s logo otherwise please specify) |  | N/A |
| Subscriptions and licenses, please specify |  |  |
| Tools, equipment purchased with price < $1000/ item. |  |  |
| Tools, equipment purchased with price > $1000/ item  Must provide invoices for depreciation purpose. |  |  |
| Income protection insurance  (Income protection insurance bought in the super is not tax deductible, please do not include it here) |  | N/A |
| Donations  Must provide invoices for recipient’s tax status verification purpose. |  | N/A |
| Tax related expenses, please specify eg accounting fee |  | N/A |
| Personal superannuation deduction  (Not the employer contributed amount)  If so, please provide Acknowledged Notice of Intent |  | N/A |
| Others, please specify |  |  |

**You must keep your written evidence for 5 years from the date you lodge your tax return.**

|  |  |  |
| --- | --- | --- |
| **Additional Questions** | **Yes** | **No** |
| 1. Do you have share investment for the year?  If so, Share statement and Summary. |  |  |
| 2. Do you have capital gain for the year?  If so, ask for capital gain checklist or provide sales and purchase documents. |  |  |
| 3. Do you have any previous carry forward capital loss?  If so, please provide which financial year you actually occurred. |  |  |
| 4. Do you have investment properties?  If so, please ask for rental property checklist. |  |  |
| 5. Do you have a sole trader/partnership business? Is it GST and PAYG registered?  If so, please provide your business worksheet. |  |  |
| 6. Are you one of the shareholders or directors of any company?  If so, please provide director fee, dividend statement, or other relevant income information. |  |  |
| 7. Are you a beneficiary of a trust? If so. Trust return, trust deed review, trust distribution summary. |  |  |
| 8. Do you have a SMSF? If so, SMSF audit and statement of concessional and non-concessional super contribution. |  |  |
| 9. Do you have foreign income? If so, foreign income statement. |  |  |
| 10. Are you working or living in remote area of Australia?  If so, please provide last year tax return copy and related information. |  |  |
| 11. Did you and your spouse purchase Private Health Insurance? |  |  |
| 12. Did you contribute superannuation to your spouse? If yes, please provide amount. |  |  |
| 13. Did you receive interest income? If yes, how much? |  |  |
| 14. Did you receive any other income? If yes, please provide details. |  |  |

* If you have rental/ investment property, please refer to the rental property checklist.
* If you have capital gain, please refer to capital gain tax checklist – property
* If you are a sole trader, please ask for ABN tax return checklist.