



# Bridgland & Co

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## **2018 Individual Income Tax Return Checklist**

### **(Complete One For Each Spouse)**

Name:

Tax File Number:  ABN:

Medicare number

Are you an Australian resident?

Has your name changed since last return?

If YES, previous name:

Home Address:

Postal Address if different

Date of Birth:

Telephone: (H)  (W)  (M)

Email:

Occupation:

Spouse Name/TFN/DOB (if applicable)

The ATO will no longer issue cheques for refunds, therefore please provide bank details:

BSB:

Account Number:

Account Name:

Please select YES or NO for each of the items listed below: If you don't know the answer, mark with a "?". Provide backup papers for all YES answers.

**ALL WORLDWIDE INCOME MUST BE INCLUDED.**

**Income – Please provide evidence of all income**

- |   |                          |
|---|--------------------------|
| 1. Salary or wages – enclose PAYG certificates  | <input type="checkbox"/> |
| 2. Allowances, earnings, tips, director's fees, etc   | <input type="checkbox"/> |
| 3. Employer lump sum payments   | <input type="checkbox"/> |
| 4. Employment termination payments  | <input type="checkbox"/> |
| 5. Australian Government allowances and payments like Newstart, youth allowance and Austudy payment   | <input type="checkbox"/> |
| 6. Australian Government pensions and allowances  | <input type="checkbox"/> |
| 7. Australian annuities and superannuation income streams   | <input type="checkbox"/> |
| 8. Australian superannuation lump sum payments  | <input type="checkbox"/> |
| 9. Attributed personal services income  | <input type="checkbox"/> |
| 10. Interest earned   | <input type="checkbox"/> |
| 11. Dividends received and dividend reinvestment plans  | <input type="checkbox"/> |
| 12. Employee share schemes  | <input type="checkbox"/> |
| 13. Distributions from partnerships, trusts and managed funds   | <input type="checkbox"/> |
| 14. Personal services income (PSI)  | <input type="checkbox"/> |
| 15. Net income or loss from business (as a sole trader)   | <input type="checkbox"/> |
| 16. Deferred non-commercial business losses   | <input type="checkbox"/> |
| 17. Net farm management deposits or repayments  | <input type="checkbox"/> |
| 18. Capital gains – include cost/date of purchase/proceeds/date of sale   | <input type="checkbox"/> |
| 19. Do you have a controlling interest in a foreign trust or company?   | <input type="checkbox"/> |
| 20. Foreign source income (including foreign pensions) or any interest in foreign assets or property  | <input type="checkbox"/> |
| 21. Rent & rental expenses or AirBnB income   | <input type="checkbox"/> |
| 22. Bonuses from life insurance companies or friendly societies   | <input type="checkbox"/> |
| 23. Forestry managed investment scheme income   | <input type="checkbox"/> |
| 24. Foreign exchange gains/losses on foreign currency bank or loan accounts – provide all statements of foreign currency bank accounts or loans | <input type="checkbox"/> |
| 25. Other income (please specify) e.g. income protection benefit received, royalties and some prize winnings                                    | <input type="checkbox"/> |
| 26. Do you have foreign assets worth more than AUD\$50k?  | <input type="checkbox"/> |

**Deductions – Please provide evidence and receipts**

**Where deductions are more than \$300 in total, receipts must be kept**

**D1. Work related car expenses – excluding travel from home to work**

- Business km travelled  km
- Total km travelled  km
- Have you kept a Log book kept for 12 weeks in the last 5 years?
- Engine size in cc
- Original purchase price \$

**D2. Work related travel expenses**

- Did you receive a travel allowance?
- If so, did you spend this fully on deductible expenditure?
- 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?
- If your spouse travelled with you, or if trip was partly for private purposes, please detail

**D3. Work related uniform and protective clothing expenses**

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

**D4. Work related self-education expenses**

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

**D5. Other work related expenses**

- Home office expenses  hours per week
- Computer and software
- Telephone/mobile phone
- Tools and equipment
- Subscriptions and union fees
- Journals/periodicals
- Depreciation
- Sun protection products (ie sunscreen and sunglasses)
- Seminars and courses not at an educational institution:
- Course fees
- Travel
- Other (please specify)
- Any other work related deductions (please specify)

**Other types of deductions**

- D6. Low value pool depreciation deduction
- D7. Expenses incurred earning interest
- D8. Dividend deductions e.g. margin loan interest
- D9. Gifts or donations
- D10. Cost of managing tax affairs/ATO audit insurance
- D11. Deductible amount of undeducted purchase price of a foreign pension or annuity

D12. Personal superannuation contributions. If yes complete following & provide superfund statements

Full name of fund:  Account No.

Fund ABN:  Fund TFN:

Have you provided the fund a notice of intention to deduct the contribution?

Has this notice been acknowledged by the fund? Provide copy of superfund letter

D13. Deduction for infrastructure project pool

D14. Forestry managed investment scheme deduction

D15. Other deductions (please specify) e.g. income protection premium paid, forex loss, startup expenses

L1. Tax losses of earlier income years

### Tax offsets/rebates

T1. Are you of aged pension age

T2. Did you receive an Australian superannuation income stream?

T3. Did you make a spouse super contribution? If so, provide spouse's super statement

T4. Do you receive the offset for living in a remote or isolated area or serving in an overseas force?

T5. Did you have out of pocket medical expenses for disability aids, attendant care or aged care accommodation?

T6. Did you maintain a dependant who is unable to work due to invalidity or carer obligations?

T7. Do you have unused landcare & water facility tax offset available from previous years?

T8. Did you have private health insurance in 2018? – provide tax statements

If so, please detail

**Other relevant information**

A. Are you entitled to the Medicare levy exemption or reduction in 2018 eg, non-resident or defence force? (If yes, please specify):

B. Did you become an Australian tax resident at any time during the 2018 income year? If so what date

C. Did you cease to be an Australian tax resident at any time during the 2018 income year? If so what date?

Did you have a spouse or de-facto (either sex) at any time during the 2018 income tax year?

From  to

Did you & your spouse live in different countries at any time in the year?

If separated during the year please advise date of separation

D. Did you receive any family trust distributions?

E. Dependants

- Did you have care of a dependent child in 2018? (under 21, or age 21 to 24 and full-time student)

- If yes how many?

F. Income tests information

- Did you receive any tax-free government pensions in 2018?

- Did you pay child support in 2018?

G. Did you make a personal non-deductible (non-concessional) contribution to superannuation?

H. Do you have a loan with a private company, or has such a loan been forgiven?

I. Do you have a foreign currency bank or loan accounts with a balance of more than AUD \$250,000 equivalent balances? If yes provide statements for year

J. Did you convert foreign currency to AUD at any time in the year? If so provide statements and details of transactions

K. If you or your employer made contributions to your superfund in 2017/18, provide superfund transaction statement for the year

**Only complete these questions if we do not prepare your spouse's tax return**

- What was your spouse's taxable income for the 2018 income year? \$
- Did your spouse have any reportable fringe benefits amounts for the 2018 income year?
- Does your spouse have any reportable super contributions for the 2018 income year?
- Did your spouse have a total net investment loss (ie, the total of any financial investment loss and a rental property loss) for the 2018 income year?
- Did your spouse pay child support during the 2018 income year?

**All to sign and date.**

Dated the .....day of ..... 20.....

.....

Signature of taxpayer

Name (print)