



Bridgland & Co

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computer before entering data

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2023 Individual Income Tax Return Checklist

(Complete One For Each Spouse)

Name:

Tax File Number: ABN:

Are you an Australian resident for tax purposes?

Home Address:

Postal Address if different

Date of Birth:

Telephone: (H) (W) (M)

Email:

Occupation: Superfund:

Spouse Name/TFN/DOB (if applicable)

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

BSB:

Account Number:

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

Deductions – Please provide evidence and receipts

Where deductions are more than \$300 in total, receipts must be kept for five years.

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?
- Original purchase price \$

D2. Work related travel expenses – employees only

- Did you receive a travel allowance?
 - o If so, did you spend this fully on deductible expenditure?
 - o If you spent more than the allowance, do you have receipts?
- If you did not receive an allowance:
 - o Did you incur and have receipts for airfares?
 - o Did you incur and have receipts for accommodation?
 - o Do you have receipts for hire cars (if applicable)?
 - o 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 – note: no claim allowed for generic clothing or shoes

- Protective clothing
- Occupation specific clothing (must have registered work logo)
- Non-compulsory uniform (must have registered work logo)
- 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 – Detail course below
- Books, stationery
- Seminars
- Travel
- Other (please specify)

D5. Other work related expenses – Business proportions only

- Home Office expenses hours per week 1/7/22 - 28/2/23
- Home Office expenses hours per week 1/3/23 – 30/6/23
(note: detailed daily diary required from 1st March 2023)
- Computer consumables and stationery, if not using fixed hourly rate
- Internet / Telephone / mobile phone, if not using fixed hourly rate
- Tools and equipment
- Subscriptions and union fees
- Journals/periodicals
- Equipment purchased
- Sun protection products (ie sunscreen and sunglasses), PPE
- Other (please specify)
- Have any of the expenses above been reimbursed by your employer?

Other types of deductions

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

D12. Did you make personal superannuation contributions for which you wish to claim a deduction?
e.g. not paid via payroll

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? (Attach copy)

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 showing receipt

T4. Do you receive the offset for living in a remote or isolated area or serving
overseas with the defence forces?

T5. Did you maintain a dependant who is unable to work due to invalidity
or carer obligations?

T6. Are you entitled to claim the landcare and water facility tax offset?

T7. Are you involved in early stage venture capital limited partnerships?

T8. Are you an early stage investor in an "early stage innovation company"?

T9. Did you have private health insurance in 2023?

Other relevant information

A. Are you entitled to the Medicare levy exemption or reduction in 2023 eg, non-resident or defence force? (If yes, please specify):

B. Did you become an Australian tax resident at any time during the 2023 income year? If so what date

C. Did you cease to be an Australian tax resident at any time during the 2023 income year? If so what date?

Did you have a spouse or de-facto (either sex) at any time during the 2023 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, or dividends from private companies?

E. Dependants

- Did you have care of a dependent child in 2023? (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 2023?

- Did you pay child support in 2023?

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

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

I. **If you or your employer made contributions to your superfund in 2022/2023, provide superfund transaction statement for the year**

J. Did you receive any benefit from an employee share acquisition scheme?

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

- What was your spouse's taxable income for the 2023 income year? \$
- Did your spouse have any reportable fringe benefits amounts for the 2023 income year?
- Does your spouse have any reportable super contributions for the 2023 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 2023 income year?
- Did your spouse pay child support during the 2023 income year?

All to sign and date.

Dated theday of 20.....

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Signature of taxpayer

Name (print)