

Individual Tax Return Checklist

Please fill in the below form to the best of your ability. Some questions simply require yes or no answers, other questions have line spaces for further information. To expand on some of your answers below, please use the notes section at the end of the form, along with any enquiries you may have. Thank you for your time filling in this questionnaire to better assist us with your ITR.

Personal Details

I am an existing client, and have no reportable changes to my personal information ☐

Full Name: _____

Address: _____

Email Address: _____

Primary Contact Number: _____

Bank account name: _____

BSB: _____ Account Number: _____

Preferences

Preferred Payment Method: ☐ Pay before lodgement ☐ Fee from refund (\$25 inc admin fee)

Preferred Signing Method: ☐ Digital sign to my email ☐ Sign in-person at the office

Income

Did you receive a salary or wages from an employer? ☐ Yes ☐ No

Employer's Name: _____

Employer's Name: _____

Employer's Name: _____

Main Occupation: _____

Did you receive any allowances from your employer? ☐ Yes ☐ No

What were the allowances for: _____

Did you receive any interest from bank accounts? ☐ Yes ☐ No

Please provide total sum of all interest and term deposit amounts: \$_____

Did you receive any other income (Dividends, Trust Distributions, Partnership)? ☐ Yes ☐ No

Did you sell any assets (Property, Gold, Silver, Coins, Shares etc)? ☐ Yes ☐ No

Did you receive any foreign source income? ☐ Yes ☐ No

Did you receive any Rental Income? ☐ Yes ☐ No

Deductions

Did you use your motor vehicle for any work purposes? ☐ Yes ☐ No

If yes to the above: ☐ cents per km method _____ kms ☐ Logbook method

Did you travel overnight for work? ☐ Yes ☐ No

Did you wear embroidered work uniforms? ☐ Yes ☐ No

Did you purchase additional protective or occupation specific work wear? ☐ Yes ☐ No

Were you engaged in study directly correlated to your current employment? ☐ Yes ☐ No

Did you purchase any equipment or devices that are used for work purposes? ☐ Yes ☐ No

Do you use your mobile for work purposes? ☐ Yes ☐ No

If yes to the above: \$_____ per month Percentage of work usage _____%

Do you use your internet for work purposes? ☐ Yes ☐ No

If yes to the above: \$_____ per month Percentage of work usage _____%

Do you work from home? ☐ Yes ☐ No

If yes to the above: _____ hrs per week, over _____ weeks

Please list any other expenses you want to query related your employment below:

Description: _____ \$ _____

Description: _____ \$ _____

Description: _____ \$ _____

Description: _____ \$ _____

Description: _____ \$ _____

Description: _____ \$ _____

Do you make any donations to registered charities? ☐ Yes ☐ No

Name of charity: _____ amount donated: \$ _____

Do you pay a tax agent for your previous tax return lodgement? ☐ Yes ☐ No

If yes to the above: \$ _____

Do you make any additional super contributions that you intend to claim? ☐ Yes ☐ No

Have you sent your Super Fund a 'Notice of Intent', and have they responded? ☐ Yes ☐ No

Do you have income protection insurance outside of your Super? ☐ Yes ☐ No

Other Questions

Do you have any dependent children or children that are students ? ☐ Yes ☐ No

If yes to the above, how many: _____

Do you have full Private Health Insurance? ☐ Yes ☐ No

Do you Pay any child support? ☐ Yes ☐ No

If yes to the above, how much: \$ _____

Do you have a spouse? ☐ Yes ☐ No

If yes to the above, do we handle their tax return this year also? ☐ Yes ☐ No

If no to the above, please provide the information below:

Full name: _____

Date of Birth: _____ Spouses taxable income: _____

Please use the below lines to expand on any answers above or for any questions you have for our accountants:

Please sign below declaration

I agree to allow Ashton Garland Accounting to access my information via the ATO portal to assist with the completion and lodgement of my tax return and other tax affairs.

Signature: _____

Date: _____