



Your Financial Key

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2009 Individual Income Tax Return Checklist

Tax File Number:/...../..... ABN:

Are you an Australian resident? YES/NO/UNSURE

Name: Mr/Mrs/Ms/Miss

Name changed since last return? YES/NO

If YES, previous name:

Current **RESIDENTIAL** Address:

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Has RESIDENTIAL address **changed** from last tax return? YES/NO

Current **POSTAL** Address:

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Has Postal address **changed** from last tax return? YES/NO

Date of birth: / /

Telephone: (H) (W) (M)

Email:

Occupation:

Spouse details (if applicable):

Do you want to use Electronic Funds Transfer (EFT)? YES/NO

If YES, provide bank details BSB _ _ - _ _ Account Number:

Account in name of:



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INCOME — Please provide evidence

Please circle **YES** or **NO** for each of the items listed below:

- | | | |
|--|-----|----|
| 1. Salary or wages | YES | NO |
| 2. Allowances, earnings, tips, director’s fees etc | YES | NO |
| 3. Employer lump sum payments | YES | NO |
| 4. Employment termination payments | YES | NO |
| 5. Australian Government allowances & payments like Newstart, Youth allowance and Austudy payment. | YES | NO |
| 6. Australian Government pensions and allowances | YES | NO |
| 7. Australian annuities and superannuation income streams | YES | NO |
| 8. Australian superannuation lump sum payments | YES | NO |
| 9. Attributed personal services income | YES | NO |
| 10. Reportable fringe benefits amounts | YES | NO |
| 11. Interest | YES | NO |
| 12. Dividends | YES | NO |
| 13. Distributions from partnerships and/or trusts | YES | NO |
| 14. Personal services income (PSI) | YES | NO |
| 15. Net income or loss from business | YES | NO |
| 16. Deferred non-commercial business losses | YES | NO |
| 17. Net farm management deposits or withdrawals | YES | NO |
| 18. Net capital gains | YES | NO |
| 19. a) Direct or indirect interest in controlled foreign entities | YES | NO |
| 19. b) Transfer of property or services to a foreign resident trust | YES | NO |
| 19. c) Interests in a foreign investment fund (FIF) or a foreign life assurance policy (FLP). | YES | NO |
| 20. Foreign source income (including foreign pensions) and foreign assets or property. | YES | NO |
| 21. Rent | YES | NO |
| 22. Bonuses from a life insurance company or friendly society policy | YES | NO |
| 23. Forestry managed investment scheme income | YES | NO |
| 24. Other income (please specify) | YES | NO |

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DEDUCTIONS — Please provide evidence

D1. Work related car expenses

— cents per kilometre method (up to a maximum of 5,000kms)	YES	NO
— log book method	YES	NO
— one-third of actual expenses method	YES	NO
— 12% of actual cost method	YES	NO

D2. Work related travel expenses

Employee domestic travel with reasonable allowance	YES	NO
— If the claim is more than the reasonable allowance rate, do you have receipts for your expenses?	YES	NO
Overseas travel with reasonable allowance	YES	NO
— Do you have receipts for accommodation expenses?	YES	NO
— If travel is for 6 or more nights in a row, do you have travel records? (e.g. a travel diary)	YES	NO
Employee without a reasonable travel allowance	YES	NO
— Did you incur and have receipts for airfares?	YES	NO
— Did you incur and have receipts for accommodation?	YES	NO
— Do you have receipts for hire cars (if applicable)?	YES	NO
— Did you incur and have receipts for meals and incidental expenses?	YES	NO
— Do you have any other travel expenses?	YES	NO
Other work-related travel expenses e.g. a borrowed car (please specify)	YES	NO

D3. Work related uniform and other clothing expenses

Protective clothing	YES	NO
Occupation specific clothing	YES	NO
Non-compulsory uniform	YES	NO
Compulsory uniform	YES	NO
Conventional clothing	YES	NO
Laundry expenses (up to \$150 without receipts)	YES	NO
Dry cleaning expenses	YES	NO
Other claims such as mending/repairs, etc. (please specify)	YES	NO
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D4. Work related self-education expenses

Course taken at educational institution:

— union fees	YES	NO
— course fees	YES	NO
— books, stationery	YES	NO
— depreciation	YES	NO
— seminars	YES	NO
— travel	YES	NO
— other (please specify)	YES	NO

D5. Other work related expenses

Home office expenses	YES	NO
Computer and software	YES	NO
Telephone/mobile phone	YES	NO
Tools and equipment	YES	NO
Subscriptions and union fees	YES	NO
Journals/periodicals	YES	NO
Depreciation	YES	NO
Sun protection products (i.e. sunscreen and sunglasses)	YES	NO
Seminars and courses not at an educational institution:		
— course fees	YES	NO
— travel	YES	NO
— other (please specify)	YES	NO
Any other work related deductions (please specify)	YES	NO

Other types of deductions

D6. Low value pool deduction	YES	NO
D7. Interest and dividend deductions	YES	NO
D8. Gifts or donations	YES	NO
D9. Cost of managing tax affairs	YES	NO
D10. Australian film industry incentives	YES	NO
D11. Deductible amount of undeducted purchase price of a <u>foreign</u> pension or annuity	YES	NO



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D12. Personal superannuation contributions YES NO

Full name of fund Account number.....

Fund ABN Fund TFN

D13. Deduction for project pool YES NO

D14. Forestry managed investment scheme deduction YES NO

D15. Other deductions (please specify) YES NO

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L1. Tax losses of earlier income years YES NO

Tax offsets/rebates

T1. Do you have a dependent spouse (without dependent child or student),
a housekeeper or a child-housekeeper? YES NO#

These tax offsets may not be available where the taxpayer is eligible to claim FTB Part B.

T2. Are you a senior Australian? YES NO

T3. Are you a pensioner? YES NO

T4. Did you receive a superannuation income stream? YES NO

T5. Did you have private health insurance in 2009? YES NO

T6. Have you incurred expenses for your child's education? YES NO

T7. Do you have a child that was born or adopted between
1 July 2001 and 30 June 2004? YES NO

T8. Did you make superannuation contributions on behalf of your spouse? YES NO

T9. Did you live in a remote area of Australia or serve overseas with the
Australian Defence Force or UN armed forces in 2009? YES NO

T10. Did you have net medical expenses over \$1,500? YES NO

T11. Did you maintain a parent, spouse's parent or invalid relative? YES NO

T12. Are you entitled to claim the landcare and water facility tax offset? YES NO

T13. Are you a mature age worker with 'net income from working' of
less than \$63,000? YES NO

T14. Are you a 'small business entity' with an annual turnover of \$75,000 or less? YES NO

T15. Other tax offsets (please specify) YES NO

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Other relevant information

A. Are you entitled to the Medicare levy exemption or reduction in 2009? YES NO

(If yes, please specify):

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B. Were you under the age of 18 on 30 June 2009? YES NO

C. Did you become an Australian tax resident at any time during the 2009 income year? YES NO

D. Did you cease to be an Australian tax resident at any time during the 2009 income year? YES NO

E. Did you have a spouse at any time during the 2009 income tax year? YES NO

F. Do you have a HECS/HELP liability or a student supplement loan debt? YES NO

G. Did you pay any tax within 14 days before the due date of the liability (e.g. HECS/HELP)? YES NO

H. Did a trust or company distribute income to you in respect of which family trust distribution tax was paid by the trust or company? YES NO

I. Do you have a loan with a private company or have such a loan amount forgiven? YES NO

(If yes, please specify) - (reviewer consider if deemed dividend in year under Division 7A):

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J. Did you receive any benefit from an employee share acquisition scheme? YES NO

(If yes, please specify) — (reviewer consider if assessable in year):

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K. Family Tax Benefit (FTB)
— Did you have care of a dependent child in 2009? YES NO

— Did you or your spouse receive FTB through the Family Assistance Office in 2009? YES NO

Dated the day of 20.....

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Signature of taxpayer

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Name (PRINT)