



2019 INDIVIDUAL INCOME TAX RETURN CHECKLIST

OFFICIAL USE ONLY

Reconciled to the prefill

Information received by: Meeting Email Post

Contact information updated in XPM

Full name	
Address (residential)	
Address (postal)	
Telephone	Mobile:
	Business Hours (work):
	After Hours (home):
Email	
Electronic Banking Details (for refund if applicable)	BSB:
	Account Number:
	Account Name:
Main Occupation	
How do you wish to receive and sign your return? (please circle)	<div style="display: flex; justify-content: space-around; width: 100%;"> Paper DocuSign Electronic (PDF attached to email) </div>

If your personal circumstances have changed, e.g. new partner, married, separated, birth of child etc please let us know and we will contact you for more information.

**PLEASE RETURN COMPLETED FORM TO OUR OFFICE.
PLEASE INDICATE INFORMATION PROVIDED OR NOT APPLICABLE FOR EACH OF THE ITEMS LISTED.
ATTACH SUPPORTING DOCUMENTATION.**

INCOME		Y/N	Information Provided
1	Salary or Wage (PAYG Payment Summary)		
2	Allowances, Earnings, Tips, Director's fees, etc		
3	Employer Lump Sum Payments See PAYG Payment Summary for Details at Label A and B		
4	Eligible Termination Payments (ETP's) Obtain and attach any ETP payment summaries and employer termination statements		
5	Australian Government Allowances and Payments Youth Allowance, Newstart, Sickness, Special Benefit, Educational, Training Allowances		
6	Australian Government Pensions and other Allowances		
7	Other Australian Pensions or Annuities – including superannuation pensions		
8	Australian Superannuation Lump Sum Payments		
10	Gross Interest From bank accounts or other sources		
11A	Dividends Includes dividend reinvestment (DRP) or any other information (eg: buybacks, consolidations, return of capital)		
11B	Share Purchases Did you purchase any shares throughout the year (eg: purchase documents, sales contracts)		
12	Employee Share Schemes		
13	Partnerships and Trusts Provide tax statements for any managed funds or copy of partnership's or trust's return		
14/15/ 16	Net Income or Loss from Business Provide a summary of income and expenses that relate to the business		
18	Capital gains If you have sold an asset (e.g.: shares, managed fund, property); please provide the purchase date, purchase cost, sale date and sale price		
20	Foreign Source Income (including foreign pensions) and foreign assets/property		
21	<p>Rental properties Property address: _____</p> <p><u>For new properties only:</u> Date Purchased: ____ / ____ / ____ Amount: \$ _____</p> <p>Attach copy of the Purchase Contract and Settlement Statement.</p> <p><u>All Rental Properties:</u></p> <ul style="list-style-type: none"> • Rental income (annual statement from property agent, if engaging services of an agent) • Interest charged on money borrowed for the rental property • Details of other expenses relating to the rental property such as water charges, land tax and insurance premiums • Details of any capital works expenditure to the rental property 		

DEDUCTIONS		Y/N	Information Provided
D1	<p>Work-related car expenses</p> <p>There are two methods available are:</p> <p>If you have travelled greater than 5,000 business kilometres please provide a valid logbook for calculation of business use percentage.</p> <p>If you have travelled less than 5,000 business kilometres please provide your business kilometres travelled.</p>		
D2	<p>Work-related travel expenses</p> <p>If yes, please provide any details, receipts and/or travel diary for any employee domestic or overseas travel, also including any out of pocket travel expenses such as tolls, parking, taxi/uber fares.</p>		
D3	<p>Work-related uniform, occupation specific or protective clothing, laundry and dry-cleaning expenses</p> <ul style="list-style-type: none"> • Protective clothing and safety footwear; or • Compulsory uniforms – non-conventional clothing that the employee is compelled to wear; or • Occupational-specific – clothing that identifies a person as a member of a specific profession, trade, vocation. 		
D4	<p>Work-related self-education expenses</p> <p>Including student union fees, books, stationery, consumables, travel, and depreciation.</p>		
D5	<p>Other work-related expenses</p> <p>Examples include:</p> <ul style="list-style-type: none"> • Union Fees, Licence Fees & Registrations • Home Office (hours per week you work from home) • Subscriptions, Memberships & Journals • Mobile, telephone & internet • Overtime meals & other allowance W/Off • Seminars and training • Tools • Stationery <p>NOTE: Assets costing less than \$300 can be written off while those exceeding \$300 must be depreciated</p>		
D7/D8	<p>Interest & Dividend Deductions</p> <p>Expenses incurred in earning interest, dividend or other investment income.</p>		
D9	<p>Gifts or donations</p>		
D10	<p>Cost of managing tax affairs</p> <p>If your return was prepared by us last year, we will have the cost on our system.</p>		
D12	<p>Personal super contributions</p> <p>Please provide:</p> <p>Full name of fund: _____</p> <p>Acc No: _____</p> <p>Fund ABN: _____</p> <p>Fund TFN: _____</p> <p>To claim a deduction for personal super contributions you must provide us with a Notice of Intent to Claim a Deduction form from your super fund.</p> <p>Without this form we cannot lodge your tax return. It can be obtained via the ATO website or contact Kidmans Partners for more information.</p> <p>NOTE: If it is from a SMSF managed by us we will take care of this for you.</p>		
D15	<p>Other deductions</p> <p>Income protection insurance premiums.</p>		

