



2020 INDIVIDUAL INCOME TAX RETURN CHECKLIST

OFFICIAL USE ONLY

Reconciled to the prefill []

Info received by: Meeting [] Email [] Post []

Contact information updated in Practice Management System []

Full name	
Address (residential)	
Address (postal)	
Telephone	Mobile:
	Business Hours (work):
	After Hours (home):
Email (which is suitable to receive your confidential financial information)	
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>PaperDocuSignElectronic (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/Income Statement)		
2	Allowances, Benefits, 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 (e.g.: buybacks, consolidations, return of capital)		
11B	Share Purchases Did you purchase any shares throughout the year (e.g.: 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		
17	Net farm management deposits or repayment Provide a summary of net farm management deposits or repayments, deductible deposits, early repayments – natural disaster and drought, other repayments		

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		
19	Foreign entities Did you have either a direct or indirect interest in a controlled foreign company (CFC)? If so, please provide CFC income. Have you ever, either directly or indirectly, caused the transfer of property (incl. money) or services to a non-resident trust estate? Transferor trust income		
20	Foreign Source Income (including foreign pensions) and foreign assets/property		
21	Rental properties Property address: <hr/> <u>For new properties only:</u> Date Purchased: ____ / ____ / ____ Amount: \$ ____ Attach copy of the Purchase Contract and Settlement Statement. <u>All Rental Properties:</u> <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 Number of weeks the property was rented out during the financial year		

DEDUCTIONS		Y/N	Information Provided
D1/D2	<p>Work-related car expenses</p> <p>There are two methods available:</p> <p>If you have travelled greater than 5,000 business kilometres, <u>OR</u> have a vehicle designed to carry 1 Tonne or more, please provide a valid logbook for calculation of business use percentage, and a record of actual expenses.</p> <ul style="list-style-type: none"> Please indicate if your vehicle is designed to carry 1 Tonne or more: <p>Y / N (please circle)</p> <p>If you have travelled less than 5,000 business kilometres, and your vehicle is <u>not</u> designed to carry 1 Tonne or more, please provide your business kilometres travelled.</p> <p>Cents per kilometre rate \$0.68 per/km</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, License 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 Sun protection (i.e. Sunscreen & sunglasses) <p>NOTE: Assets costing less than \$300 can be written off while those exceeding \$300 must be depreciated</p> <p>Home office Pre (01.03.2020) and Post (01.03.2020) Covid-19 (please provide the split between 2 periods)</p> <ul style="list-style-type: none"> Home office (hours per week you work from home) Mobile, Telephone & Internet Stationery Purchase of office furniture Purchase of a computer, printer etc. <p>For more information, please see: https://www.ato.gov.au/general/covid-19/support-for-individuals-and-employees/employees-working-from-home/</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 of \$2 and over to deductible gift recipients</p>		
D10	<p>Cost of managing tax affairs/Tax agent's fees and other accounting and tax audit fees</p>		

	If your return was prepared by us last year, we will have the cost on our system.		
D12	Personal super contributions Please provide: Full name of fund: _____ Acc No: _____ Fund ABN: _____ Fund TFN: _____ 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. Without this form we cannot lodge your tax return. It can be obtained via the ATO website or contact Kidmans Partners for more information. NOTE: If it is from a SMSF managed by us we will take care of this for you.		
D15	Other deductions Income protection insurance premiums.		

TAX OFFSETS		Y/N	Information Provided
T3	Superannuation contributions on behalf of your spouse Did you make contributions to a complying superannuation fund on behalf of your spouse?		
T4	Zone Offset Did you live in a remote area of Australia or serve overseas with the Australia Defence force of the UN armed forces for the year?		
T5	Total net medical expenses Did you have net medical expenses for the year that relate only to disability aids, attendant care, or aged care expenses?		
T6	Invalid and invalid career Did you maintain a dependent who is unable to work due to invalid or career obligations?		

OTHER RELEVANT INFORMATION		Y/N	Information Provided
Did you have Private Health Insurance for the year? If yes, please provide a copy of the statement.			
If we do not prepare your spouse's tax return: <ul style="list-style-type: none"> Name: _____ D.O.B: _____ What is their Taxable Income for the year? : _____ 			

Please provide details of all dependent children (if applicable)

Name: _____

Date of Birth: / /

Name: _____

Date of Birth: / /

Name: _____

Date of Birth: / /

OTHER CLIENT NOTES