

TAX RETURN CHECKLIST



Build Your Business & Grow Your Wealth

Please complete this form and upload it to Dropbox and email the link to team@tolevskypartners.com.au

Only complete this section if your details have changed:

GIVEN NAME: _____ MIDDLE NAME: _____

SURNAME: _____ DATE OF BIRTH: _____

TAX FILE NUMBER: _____ OCCUPATION: _____

ADDRESS: _____

MOBILE: _____

BANK ACCOUNT NAME*: _____

BANK BSB NUMBER*: _____ BANK ACC* NUMBER: _____

EMAIL ADDRESS: _____

NAMES OF DEPENDENT CHILDREN & D.O.B

NAME OF SPOUSE OR PARTNER & D.O.B

INCOME

Are you an employee? YES ☐ NO ☐

Your PAYG income summaries from your employer will be available to Tolevsky Partners from the ATO. Do not need to supply them.

Are you a business owner? YES ☐ NO ☐

If you are NOT using Xero, please provide a copy of your Profit and Loss Statement and Balance Sheet.

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BANK INTEREST RECEIVED

If you have received bank interest it will automatically be available to Tolevsky Partners from the ATO.

DIVIDENDS

If you have received dividends this will automatically be available to Tolevsky Partners from the ATO.

DISTRIBUTIONS FROM MANAGED FUNDS

E.g. Vanguard ETF, BT funds, Merrill Lynch.

If you received distributions from Managed funds, lease provide Annual Tax Statement provided by fund manager.

RENTAL PROPERTY INCOME

If you have received income from a rental property, [please click](#) here to provide details.

CAPITAL GAINS

Did you sell any assets such as shares or property which were acquired after 20 September 1985?

YES ☐ NO ☐

If yes, please provide the following details:

ASSET SALE AMOUNT	ORIGINAL COST PLUS PURCAHSE & SALE COSTS	NET CAPITAL GAIN

DEDUCTIONS

If you are a business owner, do NOT complete the work-related deductions section because it should already be in the profit and loss statement for your business.

WORK-RELATED CAR EXPENSES

Did you use your own car for work purposes through the year?

YES ☐

NO ☐

Please explain how you used your car for work.

Which method of claiming car expenses do you wish to claim?

Log book Method- (Ensure you have kept a log book for a continuous period of 12 weeks over the past 5 years)

Please complete the [Motor Vehicle checklist](#).

OR

Kilometer's Method

You haven't kept a logbook but use your car for work, how many km you would have travelled for work?

Car Registration Number: _____

Kilometers: _____

WORK-RELATED CLOTHING EXPENSES

If you have specific work-related clothing, please provide details:

Protective clothing _____

Uniform with a company logo _____

Occupation specific clothing _____

Laundry (up to \$150 without receipts) _____

WORK-RELATED SELF EDUCATION

Name of Course _____ Institution _____

How does it relate to your current employment/employer? _____

Fees (Excluding HECS/HELP debt) _____

Books/Stationery/Consumables _____

Travel _____

Home Office _____ Hours per week _____ How many weeks _____

OTHER WORK-RELATED DEDUCTIONS

Union fees/Professional bodies
(List names and amounts) _____

Diary/Printing/Postage/Stationery _____

Books and Journals _____

Seminar costs _____

Sickness & Accident Insurance/
Income protection _____

HOME OFFICE EXPENSES

If you have a separate room of your home set aside used as a home office, please provide:

Internet Amount _____ Percentage used for work _____ %

Power and heating Amount _____ Percentage used for work _____ %

Mobile Phone Amount _____ Percentage used for work _____ %

If you do NOT have separate room of your home set aside and do work from home, or do not have receipts please advise the number of hours you worked from home _____

Outdoor workers
(Sunglasses/Sunscreen/Hats) Amount _____ Percentage used for work _____ %

Tools & Equipment-Over \$300
(List dates & percentage used
or work purpose) _____

Journals and periodicals _____

Personal protective equipment e.g face masks _____

Seminars and courses not at an educational institution (e.g., course fees, travel) _____

OTHER TYPES OF DEDUCTIONS

SUPERANNUATION CONTRIBUTIONS

Did you make personal concessional contributions to superannuation?

If yes, please provide the amount for the financial year, the name of your fund, account number, Fund ABN and TFN. Note: Ensure you have provided your fund with a notice of intention to deduct the contribution, otherwise the ATO may disallow your deduction.

Tax Agent Fees paid to prepare your previous year tax return _____

Interest and dividend deductions _____

Donations made to a Deductible Gift Recipient (DGR), please list the name and the amount donated. This includes School Building Fund.

NOT SURE IF SOMETHING IS DEDUCTIBLE?

Do you have any "other" tax deductions not mentioned above that you wish to claim? If you are not sure, of their deductibility, please list the items and amounts with a brief explanation and we can decide if they are tax-deductible.

ITEM	AMOUNT \$	EXPLANATION

TAX OFFSETS

PRIVATE HEALTH INSURANCE

Do you have private health insurance?

YES

☐

NO

☐

Please confirm that all your family members (including your spouse and children were covered by private health insurance hospital cover

YES

☐

NO

☐

SPOUSE OR PARTNERS TAXABLE INCOME*

(Includes same-sex couples)

Did you have a spouse/partner for the full financial year?

YES

☐

NO

☐

Does your spouse/partner receive any benefits from Centrelink?

YES

☐

NO

☐

If your spouse was not a client of Tolevsky Partners, what is their taxable income: \$ _____

Have you made superannuation contributions on behalf of your spouse? Please provide the amount for the financial year, the name of your fund and the membership number.

Please provide any additional comments you wish to make below:

Please ensure that the information you have supplied is correct. The onus is on you, the taxpayer, to be able to substantiate the information provided. Thank you in advance.

SIGNED: _____

DATED: _____