



Personal tax checklist

This checklist is designed to cover the documentation and information we need in order to complete your tax return and will assist you in gathering and providing us with all your information at tax time.

If you have any questions please contact Erin Turner - erin@byata.com.au

Client details

Please fill out this form and either include it with your source documents or bring it along to your appointment

Personal details

If you are a new client, or if your details have changes please complete the whole checklist. If you are an existing client please complete your name and any personal details that have changed.

**We are now a green office and ask all clients to list their preferred email address for documentation to be forwarded to. Thank you for your support.*

First name: _____ Surname: _____
Date of birth: _____
Tax File Number: _____
Residential address: _____ Suburb: _____ Postcode: _____
Postal address (if different): _____ Suburb: _____ Postcode: _____

Preferred method of communication: Email Phone

Phone number: _____

Email (all documents will be emailed to this address): _____

Occupation: _____

Marital status: Single Married De facto Divorced

Dependants: No Yes:

Bank details (We require your bank details to transfer your tax refund if applicable)

BSB: _____

Account no: _____

Account name: _____

Would you like us to take our fee out of your refund for no extra charge?

Spouse details (if applicable)

First name: _____ Surname: _____

Date of birth: _____

Tax File Number: _____

Taxable income (If we are not completing their return this year)

Personal tax checklist income

Payg payment summaries (group certificates)

Government allowance statement or payment summary

Employment termination payment summary

Non-government allowance statement or payment summary

Superannuation pension

Bank statement showing annual interest earned

Foreign income

Rental income. Please refer to our rental property checklist for more information [here](#)

Details of other income received

Occupation

Investments

- Dividends statements (generally two statements per financial year)
- Managed fund annual tax statement
- Partnership or trust annual distribution statement
- Details of interest earned & other charges paid on loans in relation to interest & dividend-bearing investments.

If you have sold shares or other investments during the year, please refer to our capital gains checklist which outlines the information you will need to provide [here](#).

Deductions

- Motor vehicle expenses
- Log book (no more than 5 years old)
- Motor vehicle expenses (e.g. Fuel and oil, insurance and registration, service or repairs):

Log book percentage:

Kilometre method (limited to 5,000kms)

Make, model and engine capacity of the vehicle:

Estimated number of kilometres traveled for the tax year or details of trips:

New motor vehicles purchased (if log book)

Provide dealer invoice and loan contract (if financed)

Log book percentage

Travel expenses

Taxi, airfares, parking, train fares, tolls, accommodation, hire cars, meals (overnight only)

Work related clothing

Self-education expenses relating to current occupation

Course fees, student membership fees, travel expenses, stationary, details of kilometres traveled

Other work related expenses

For example: trade or business tools, journals and/or subscriptions, union fees, home office expenses, telephone/mobile phone, Internet connection, computer hardware and software purchases, sickness and accident insurance premiums, seminars and stationery.

Donations

To charities and school building funds

Travel to tax agent

Make, model and engine capacity of the vehicle

Estimated number of kilometres traveled or details of trips

Other information

Private health insurance important due to ato requirements

Please ensure you provide a private health insurance statement for the financial year. If you do not have a private health insurance, please ensure you fill out the [spouse details](#) section & list the number of [dependents](#) you have.

Medical expenses

Please provide details of out of pocket medical expenses incurred (if they exceed \$2,162 & an offset was claimed in the 2013 year). Please refer to our medical expenses checklist [here](#)

Once your form is completed and collated with your supporting documents you can either scan and attach them to an email info@byata.com.au, or post them to [PO box 186 glenbrook nsw 2773](#) or drop them into our office or bring them along to your appointment.