



# Personal Tax Checklist

## CLIENT DETAILS

We want to make sure we complete your tax return as efficiently as possible. Which means we need your help! Please fill out this form and either email it to us or bring it along to your appointment. If you have any questions please email [info@byata.com.au](mailto:info@byata.com.au)

## 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 a green office and ask all clients to list their preferred email address for documentation to be forwarded to..*

Name: .....

TFN: ..... Date of birth: .....

Residential address: .....

Suburb.....Postcode.....

Postal address: .....

Suburb.....Postcode.....

Phone number: .....

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

Marital status:.....

Occupation: .....

Dependants: No/Yes If yes, number.....

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?  YES  NO

## SPOUSE DETAILS (IF APPLICABLE)

Name: .....

TFN: ..... Date of birth: .....

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



### Personal tax checklist income (please tick and provide proof)

- 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

### 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.

### Personal tax checklist deductions (please tick and complete or provide proof)

#### **MOTOR VEHICLE EXPENSES**

- Log Book Method

Provide dealer invoice and loan contract (if financed)

Log book percentage (no more than five years old).....

Motor vehicle expenses

Fuel.....

Registration & Insurance.....

Service & Repairs.....

- Kilometre Method (limited to 5,000 kms)

Make, model and engine capacity of vehicle.....

Estimated number of kms travelled for the tax year.....

#### **TRAVEL EXPENSES**

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

.....  
.....

#### **WORK RELATED CLOTHING**

Sun glasses, hat, protective and safety clothing and footwear, compulsory uniforms

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.....



**SELF-EDUCATION EXPENSES RELATING TO CURRENT OCCUPATION**

Course fees, student membership fees, travel expenses, stationary, details of kilometres travelled  
.....  
.....

**OTHER WORK RELATED EXPENSES**

For example: Trade or business tools, journals and/or subscriptions, union fees, home office expenses (number of hours per week working from home), telephone/mobile phone and business percentage, internet cost and business percentage, computer hardware and software purchases, briefcases and handbags, seminars and stationery.  
.....  
.....

**DONATIONS**

To registered charities and building funds  
.....  
.....

**COST OF INVESTMENTS**

Interest paid for loan for purchase of shares, financial planning fees (not initial cost)  
.....  
.....

**COST OF ACCOUNTANTS & TRAVEL TO TAX AGENT**

Cost of accountant  
.....  
.....

Make, model and engine capacity of the vehicle & Estimated number of kms travelled  
.....  
.....

**OTHER DEDUCTIONS**

Sickness and accident insurance, interest being claimed on failed businesses or investments  
.....  
.....



## 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 on page 1 of this checklist. Please list the number of dependents you have.

Once form is completed collate with your supporting documents and either email to [info@byata.com.au](mailto:info@byata.com.au) or post to PO Box 186 Glenbrook NSW 2773, drop into our office or bring to your appointment.