

## 2013 Individual Tax Return Checklist

Please select "Yes" or "No" for each of the items below. If you answer "Yes" on any items, please attach the required documents.

Please complete this form, and together with supporting documents, forward it to us by email ([taxreturn@skaccountingsolutions.com.au](mailto:taxreturn@skaccountingsolutions.com.au)) or fax (03 9670 1885)

### Income – Did you have the following incomes?

- |    |  |          |
|----|--|----------|
| 1  | <b>Salary or Wages</b><br>- Attach PAYG payment summaries  | Yes / No |
| 2  | <b>Allowances, earnings, tips, director's fees etc</b><br>- Attach PAYG payment summaries  | Yes / No |
| 3  | <b>Employer Lump sum payments</b>  | Yes / No |
| 4  | <b>Employment termination payments</b><br>- Attach certificate, statements of eligible termination payment                               | Yes / No |
| 5  | <b>Australian Government Allowance &amp; Payment (e.g. Newstart, Youth Allowance and Austudy payment)</b><br>- Attach payment summaries  | Yes / No |
| 6  | <b>Australian Government pensions and allowances</b><br>- Attach statement of pension  | Yes / No |
| 10 | <b>Interest</b><br>- Attach bank statement showing the total interest paid and any tax deducted with the details of BSB & Account Number | Yes / No |
| 11 | <b>Dividend</b><br>- Attach dividend statements from company   | Yes / No |
| 13 | <b>Distributions from partnerships and / or trusts</b><br>- Attach managed fund annual tax statement                                     | Yes / No |
| 15 | <b>Income or losses from business</b><br>- Attach summarized profit and loss statement   | Yes / No |
| 18 | <b>Capital Gains</b><br>- Attach details of assets sold including shares, rental properties and other assets                             | Yes / No |
| 20 | <b>Foreign source income and foreign assets or property</b><br>- Attach details of foreign income and appropriate documentations         | Yes / No |
| 21 | <b>Rental income</b><br>- Attach annual rental statement, bank statement showing the total interest paid                                 | Yes / No |
| 24 | <b>Other income</b>  | Yes / No |

**Deductions - Did you have any of the following expenses?**

**D1 Work-related car expenses**

Q1 Did you use a car you owned or leased for work purpose? Yes / No

Q2 Was the total business kilometre more than 5,000km? Yes / No

Q3 If you choose "No" on Q2,  
What was the total business Kilometre? (Maximum of 5,000 km) -----km

Q4 If you choose "Yes" on Q2,  
Did you keep a log book? Yes / No

\* Please provide the details of a car.

Make: \_\_\_\_\_ Model: \_\_\_\_\_ Reg No: \_\_\_\_\_

\* Please provide the business use percentage according to the logbook and attach the details of Motor vehicles expenses (Registration, insurance, Fuel, repairs etc)

**D2 Work-related travel expenses**

Q1 Did you incur any travel expenses for work purpose? Yes / No

Q2 Did you receive a travel allowance? Yes / No

Q3 What was the amount of travel allowance received? Yes / No

- Attach Travel Diary and the details of expenses

**D3 Work-related uniform and other clothing expenses**

Q1 Did you have any work-related clothing laundry or dry-cleaning expenses? Yes / No

Compulsory uniform? Yes / No

No-compulsory uniform? Yes / No

Occupation-specific clothing? Yes / No

Protective clothing? Yes / No

Dry cleaning? Yes / No

Sun protection items? Yes / No

- Attach supporting documents

**D4 Work-related self-education expenses**

Q1 Did you incur any work-related self-education expenses? Yes / No

- Attach supporting documents

Q2 Did the self-education maintain or improve a skill or specific Knowledge for your current work? Yes / No

Q3 Did the self-education lead to or was likely to lead to, the increased income from your current work? Yes / No

**D5 Other work-related expenses**

Home office expenses, Computer, Telephone, Subscriptions, Journal and any other work-related expenses Yes / No

- Attach supporting documents

**D7 Interest deductions (deductions against interest income)**

- Attach supporting documents Yes / No

**D8 Dividend deductions (deductions against dividend income)**

- Attach supporting documents Yes / No

D9 **Gifts or donations** Yes / No  
- Attach supporting documents

D10 **Cost of managing tax affairs** Yes / No  
- Attach supporting documents

#### Tax offsets

T7 **Medical expenses** Yes / No  
Did you have net medical expenses over \$2,120?  
- Attach Medicare annual financial statement and private health fund statement

#### Others

M1 **Medicare levy reduction or exemption** Yes / No  
Are you entitled to a Medicare levy exemption or reduction in 2013?  
- Attach Medicare levy exemption letter

A1 **Under 18** Yes / No  
Were you under the age of 18 on 30 June 2013?

#### Private Health insurance

Did you have private health insurance in 2013? Yes / No  
- Attach 2013 private insurance annual statement

#### Additional Information

Do you have a spouse? Yes / No  
- Name  
- Date of birth  
- Spouse's taxable income

Your bank account details for tax refund  
- BSB  
- Account Number  
- Account Name