



**SURNAME:**

**FIRST NAME:**

**OTHERS:**

**ADDRESS:**

**SUBURB:**

**POSTCODE:**

**HOME TEL NO:**

**WORK TEL NO:**

**MOBILE TEL NO:**

**EMAIL:**

**TFN:**

**ABN:**

**DOB:**

**SPOUSE NAME:**

**TFN:**

**DOB:**

**HOW WOULD YOU LIKE YOUR TAX RETURN SENT TO YOU ON COMPLETION FOR SIGNING?**

EMAILED

POSTED

INTERVIEW

## INCOME

Gross salary, wages, earnings, allowances, benefits, tips and directors' fees

Any ABN income (if so, need ABN, type of work completed and any GST charged)

Lump sum and termination payments

Government and Centrelink payments including pensions and allowances

Annuities or other pensions such as account based pensions

Interest earned on any bank accounts including ATO refund interest

Dividends received or reinvested including any franking credits attached

Distributions from partnerships and trusts including managed funds

Details of any capital gains or losses incurred from the sale of CT assets such as shares and property (this includes dates and values of acquisitions and disposals)

Rent received from investment properties (complete attached Rental Property Checklist)

Details of any foreign source income

Details of any employee shares received

Details of any Buy/Sells of Cryptocurrency ie Bitcoin, Ethereum, Ripple etc

# 2018 TAX RETURN INDIVIDUAL CHECKLIST



## DEDUCTIONS

(Please provide a summary of expenses. You must have receipts to substantiate total claims of more than \$300)

### WORK RELATED EXPENSES

- Did you use your motor vehicle for work? If so:  
Total kms for work \_\_\_\_\_  
Type of Vehicle \_\_\_\_\_

- Must keep 4 week diary if claiming cents per km method

3 month logbook kept: YES  No

- Did you keep a record of actual expenses (provide summary of actual expenses if not claiming cents per kilometre method)
- Other unclaimed work related travel expenses such as taxi's, public transport and bridge tolls
- Purchase of compulsory uniforms and protective clothing including laundry costs for work related purposes
- Self education expenses including fees, books, stationery, travel and parking
- Union fees and memberships to industry and professional organisations
- Purchase of sun protection, hats, sunglasses and sunscreens for work related purposes
- Purchase of tools or trade equipment for work related purposes
- Telephone expenses for work related calls (make sure 4 week diary has been kept for a percentage)
- Meal allowance
- Seminar/course fees and travel for seminars, conferences and conventions
- Books, journals, subscriptions and professional library

- Home office setup expenses such as depreciation on purchase of equipment e.g. computer, telephone, fax and furniture. Details of home office running expenses such as heating, cooling, lighting and cleaning

- Home office 4 week diary to substantiate cents per hour claim

- Computer expenses including internet costs, hardware, software and percentage used for work

### INVESTMENT RELATED EXPENSES

- Motor vehicle expenses for investment related travel including investment related kms travelled
- Telephone accounts for investment related calls
- Seminar and course fees and travel for investment seminar, conferences and conventions
- Interest paid and fees charged on money borrowed for investments
- Bank fees incurred on investment related activities and accounts

### GENERAL EXPENSES

- Donations to registered charities for \$2 or more
- Tax preparation fees including travel to your tax agent
- Income protection insurance if paid by you (we need end of year summary letter)
- Tax deductible contributions into superannuation
- Any personal contributions into superannuation

# 2018 TAX RETURN INDIVIDUAL CHECKLIST



## TAX OFFSETS & REBATES

- Private health insurance annual tax statement
- Dependant rebates (if you have dependants including spouse, children, and parents or parents in law, please provide their details including name, date of birth and their income. Please confirm if you are in receipt of Family Tax Benefits)
- Zone rebate if you lived in a remote area during the year, the number of days and where you resided
- Medical expenses for Disability Aids, Aged Care or Attendant Care if expenses are above \$2,333
- HELP debt statement
- Spouse income (if Ascent is not doing)
- Spouse Super Contribution

## RENTAL PROPERTY

- Total rental income earned including bond money retained due to damage or in place of rent and insurance payouts (If using agent please provide agent reports)
- All rental expenses
- If the property has more than 1 owner, the percentage of your share
- Tax depreciation schedule (deductions for decline in value of depreciating assets, capital works deductions)
- If you purchased rental during the year, we require:
  - Offer & Acceptance
  - Settlement statement
  - Bank loan setup fees
- Loan statements 1/7 - 30/6

## ELECTRONIC FUNDS TRANSFER

**Electronic Funds transfer** – all tax refunds will only be paid by the ATO electronically and therefore we will require your bank account name, BSB and account number to process any tax refunds.

ACCOUNT NAME:

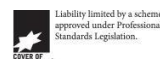
BSB:

ACCOUNT NUMBER:



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Ascent Business Directions (WA) Pty Ltd Certified Practising Accountants