



Director: Gary Hinchliffe  
Chartered Accountants  
3C/128 Fullarton Road  
Norwood SA 5067

Postal Address: PO Box 464  
Marden SA 5070

Phone: 08 8364 3246

Fax: 08 8364 3256

Email: [accountant@wiseaccountants.com.au](mailto:accountant@wiseaccountants.com.au)  
Website: [www.wiseaccountants.com.au](http://www.wiseaccountants.com.au)

## Personal Tax Return Checklist – 2023

### 1-7-2022 to 30-6-2023

Client: \_\_\_\_\_ Date: \_\_\_\_\_

To assist us in preparing your income tax return, please use this checklist when you compile your information.

**If you answer “YES” to any questions, please provide details for that question and attach relevant documents.**

With respect to your income, please keep in mind that the Australian Taxation Office has the ability to check your return income against independent sources. In particular, this applies to PAYG Payment Summary income, interest received and dividends.

For deductions, keep in mind that self-assessment applies. In the event of a Tax Office audit you will need to substantiate the deductions claimed. Please note that there have been changes made to Home Office Deductions we have provided more information in that section of this checklist.

We understand completing this Checklist takes considerable time and effort. However, this process is worthwhile as this Checklist will enable us to process your work quickly and efficiently because we will have all the necessary information at hand to complete the work.

If you have any queries or concerns, please do not hesitate to contact us.

#### **Please complete the following declaration and authority.**

*I/We hereby instruct you to prepare our Taxation Returns for the financial year ended 30 June 2023.*

*I/We undertake to supply all information necessary to carry out such services and will be responsible for the accuracy and completeness of such information.*

*You are hereby authorised to communicate with my bankers, solicitors, finance companies and all government agencies such as the ATO to obtain such information as you require to enable you to carry out the above assignment.*

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Client Name

Signature

Date

**PLEASE COMPLETE THE FOLLOWING DETAILS**

Full Name: \_\_\_\_\_

Home Address: \_\_\_\_\_

Postal Address: \_\_\_\_\_

Telephone: Home: \_\_\_\_\_ Business: \_\_\_\_\_

Fax: \_\_\_\_\_ Mobile: \_\_\_\_\_

Email: \_\_\_\_\_

Your Occupation: \_\_\_\_\_

Date of Birth: \_\_\_\_\_

Spouse's Name: \_\_\_\_\_

Spouse's Date of Birth: \_\_\_\_\_

Period that you had a Spouse: \_\_\_\_/\_\_\_\_/\_\_\_\_ to \_\_\_\_/\_\_\_\_/\_\_\_\_ or All Year

If we do not prepare your spouse's tax return, please provide their taxable income \$ \_\_\_\_\_

(This is required for determining your Medicare Levy and entitlements to rebates.)

Please provide details for each dependent child.

Name	Date of Birth	Gender		Taxable Income	Full Time Student		Full Care or Shared?
		Male	Female		Yes	No	
		<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	
		<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	
		<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	
		<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	

The Australian Taxation Office only pays refunds via Electronic Banking Transfers (EFT).

Please provide your banking details for your refund.

Bank and Branch: \_\_\_\_\_

Name of Account Holder: \_\_\_\_\_

BSB: \_\_\_\_\_ Account Number: \_\_\_\_\_

Is this a different account to the one you used last year? Y / N

**If we are preparing your tax return for the first time, please provide the following information:**

1.	Please provide the following documents:	Yes	No	Unknown
1.1	A copy of your last tax return, tax assessment and PAYG instalment notices.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1.2	Copies of any other correspondence with the Tax Office such as Objections, Penalties, Statement of Account, Garnishee Notice, Final Notice to Lodge.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Income**

2..	Have you received any of the following income payments	How Much?	Yes	No	Unknown
2.1	PAYG Payment Summaries from Employment?  (You may not have been provided with these from your employer. If you have previously lodged tax returns with the ATO we will be able to access them).  How many Employers have you had this year?		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2.2	Any allowances, benefits and other earnings <b>not</b> on your PAYG Payment Summary/ies.  Type of Allowance/s? _____	\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2.3	Employment Termination Payment Summaries?	\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2.4	Did you receive any Government Pensions, allowances and payments?  e.g. Age Pension, Youth Allowance, Jobseeker	\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2.5	An Australian Annuity or Superannuation Pension/Income Stream?	\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2.6	Reportable fringe benefits/reportable super contributions?	\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2.7	Interest received from any source in Australia From Whom?	\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<b>Please provide interest summary statements for each provider/bank.</b>	\$			
2.8	Dividends from companies in Australia? Including any reinvested dividends. <b>Please provide all dividend statements.</b>	\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2.9	Did you receive any shares from the company you work/worked for? <b>Please provide all details.</b>	\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

2.10	Income from Partnerships, Trusts or Managed Funds? <b>Please provide all details/statements.</b>	\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2.11	Income from a business? <b>Please provide all details.</b>	\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2.12	Income from <b>overseas</b> such as pensions, interest, royalties, dividends, rent or any other foreign?	\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2.13	Have you sold or disposed of any assets in Australia or Overseas, including cryptocurrency? <b>Please provide both purchase and sale details.</b>	\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2.14	Have you received rental income or made your property available for rental? <b>Please complete the attached Rental Property Schedule for each property.</b>	\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2.15	Did you receive a Pandemic Leave Disaster Payment as you had to isolate or care for someone with Covid 19?  Note this payment ended on 30-9-2022	\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2.16	Have you received any other income? <b>Please provide details of any other income you have received.</b>	\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

## Deductions

3	Deductions	How Much?	Yes	No	Unknown
3.1	Expenses in relation to your employment that was covered in part or full by a corresponding allowance.	\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3.2	Travel in relation to your employment? <b>Please provide your travel diary if you kept one.</b>	\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3.3	Did you have motor vehicle expenses? <b>Please complete the attached Motor Vehicle Schedule</b>	\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3.4	Uniform or protective clothing required for your job which identify your occupation (e.g. nurse's uniform) or your employer (e.g. shirt with logo)	\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Safety Boots, Goggles, Aprons, Dustcoats, Overalls?	\$			
	Sunscreen and outdoor protection products?	\$			
3.5	Laundry/maintenance of uniforms and protective clothing?	\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3.6	Self-education (Work related studies)? <b>Is there a direct connection to your employment? Please provide details.</b>	\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3.7	Union Fees/Professional Memberships?	\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

3.8	Purchase, insurance or repairs to work related equipment?	\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3.9	Sickness and Accident or Income Protection Insurance? <b>Please provide tax statements.</b>	\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3.10	Telephone (mobile and home and internet) expenses? % for work related calls/internet?	\$ %	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3.11	Computer and/or software? % for work related purposes?	\$ %	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3.12	Books, Journal subscriptions and professional libraries?	\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3.13	Seminars, Conferences and other training?	\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3.14	Home office expenses? e.g. light and power	hrs/wk	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3.15	Work from Home? <b>Please provide your work from home diary/roster or timesheet. This needs to be compliant with the ATO requirements.</b>	hrs/wk	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3.16	Work from Home related expenses. Did you need to purchase RAT Tests, masks, computer consumables, home office equipment or use your own phone or internet during this period? <b>Please provide receipts.</b>	\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3.17	Personal Super contributions to a complying superannuation fund (not employer contributions)? <b>Please provide Super Fund confirmation of your notice of intent to claim a tax deduction.</b>	\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3.18	Expenses relating to any dividend or interest income including interest on any money borrowed for an investment? <b>Please provide statements/invoices etc</b>	\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3.19	Gifts or donations (including school building funds)? <b>Please provide receipts</b>	\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3.20	Tax Agent Fees? (if not Wise Accountants)	\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3.21	Tax Audit Protection Insurance?	\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

## Tax Offsets

4	Tax Offsets/Others	How Much?	Yes	No	Unknown
4.1	<p>Is your normal residence located in a remote or isolated area of Australia?</p> <p>(Note this does not apply to fly in fly out arrangements)</p> <p>Where do you live? _____</p> <p>From ____ / ____ / ____ to ____ / ____ / ____</p>	\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4.2	Have you contributed any superannuation on behalf of your spouse?	\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4.3	<p>Are you exempt from paying Medicare Levy?</p> <p><b>Please provide your exemption notice.</b></p>	\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4.4	<p>Were you a member of a private health fund?</p> <p>Did you have hospital cover?</p> <p>Name of Health Fund?</p>	\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4.5	Do you have a HECS?HELP Debt?	\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4.6	Have you received any Family Tax Benefit during the financial year?	\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

## Others

5	Other	How Much	Yes	No	Unknown
5.1	Have you become or ceased to be a resident of Australia during this financial year?	\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5.2	<p>Have you paid any PAYG Instalments throughout the year to the tax office?</p> <p><b>Please provide details.</b></p>	\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Please note below any items that may require further information or explanation. We also value your feedback. Please provide comments below.


Thank you for completing this checklist