

CLIENT CHECKLIST FOR PERSONAL INCOME TAX RETURN PREPARATION

For us to complete your income tax return could you please go through this list below and read through the links provide.

Please summarise the total for each claim and provide details for any assets purchased over \$300 - date of purchase and amount.

We will assume you have the receipt when providing this summary.

- **Motor Vehicle (if claiming logbook method)**
 - o Petrol (a 3-month period at least)
 - o Rego
 - o Insurance
 - o Repairs
 - o Purchases details if purchased during the year including finance contract.
 - o Logbook showing work related %, otherwise please estimate Work Percentage.
- Motor Vehicle (if claiming the cents per KM method) provide total KM travelled, maximum 5,000 km, only claim travel for work not to work
- Tolls
- Parking
- Travel for work (not to and from work)
- Safety gear or protective clothing or work boots
- Union Fees
- Memberships to work related organisations.
- First Aid Courses
- Tools of Trade ***(if over \$300 please provide date of purchase and individual cost)***
- Work Resources (i.e – stationery, books etc)
- Course relating to your employment.
- Seminars and conferences
- Work related software subscriptions.
- Subscriptions or Memberships
- Any other work-related expenses that you may think is necessary.
- Donations
- Income Protection Insurance
- Personal Super Contribution where you have notified your fund of your intent to claim a tax deduction.

Home Office Claim

- **Cents Per Hour** - 67cents per hours with **includes** Internet, mobile, electricity, stationery usage. Need to provide hours worked only.

<https://www.ato.gov.au/Individuals/Income-deductions-offsets-and-records/Deductions-you-can-claim/Working-from-home-expenses/Fixed-rate-method---67-cents/>

- **Actual Cost** – can claim internet, mobile, electricity, stationery but need to provide evidence of the additional running costs,
For example, a continuous 4-week diary that tracks your usual pattern of working from home.
 - Electricity & gas (based on room size/floor area %)
 - Internet and phone (based on itemised usage)

<https://www.ato.gov.au/Individuals/Income-deductions-offsets-and-records/Deductions-you-can-claim/Working-from-home-expenses/Fixed-rate-method---67-cents/>

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<https://www.ato.gov.au/Individuals/Income-deductions-offsets-and-records/Occupation-and-industry-specific-guides/>

A reminder of certain expenses that CANNOT be claimed.

- Travel to and from work, car, or public transport
- Any expenses not related to you earning income.
- Child Care expenses
- Medical expenses
- Children school fees or expenses
- Travel to and from rental properties
- Relocation costs
- Drivers licence renewal (except truck driver licence or forklift licence)
- Gym Memberships
- Newspaper, Foxtel subscriptions
- Cosmetics
- Private Health Insurance Payments