

## Personal Income Tax Return Checklist 2019

NAME: .....

### Personal Income

#### **Please provide details (attach certificates):**

- |   |          |
|---|----------|
| 1. Salary / Employment Income   | Yes / No |
| 2. Interest / Dividends Received / Managed Funds (Australia & Overseas)   | Yes / No |
| 3. All Other Income e.g <u>Estates</u> , <u>Trusts</u> , <u>Partnership</u> , <u>Business</u> , overseas, annuity, or pension | Yes / No |

### Deductible Personal Expenses **Please attach details or receipts**

- |   |          |
|---|----------|
| 4. Work Related Car Expenses  | Yes / No |
| 5. Work Related Travel Expenses   | Yes / No |
| 6. Work Related Uniform / Protective Clothing / Dry Cleaning Expenses           | Yes / No |
| 7. Work Related Self-Education Expenses   | Yes / No |
| 8. Other Work Related Expenses  | Yes / No |
| 9. Low Value Pool Deductions  | Yes / No |
| 10. Interest / Dividend Deductions  | Yes / No |
| 11. Gifts or Donations  | Yes / No |
| 12. Cost of Managing Tax affairs – excluding Jewell Moore Chartered Accountants | Yes / No |
| 13. Income Protection Insurance   |          |

### Private Health Insurance

- |  |          |
|--|----------|
| 14. Did you have private health insurance for the full year - <u>Please attach details</u> | Yes / No |
|--|----------|

### Family & Partner details

- |   |          |
|---|----------|
| 15. Did you have a partner for the full year – if yes please provide their taxable income | Yes / No |
| 16. Did you have any dependants – if yes, how many?                                       | Yes / No |

### Other Issues

- |   |          |
|---|----------|
| 17. Do you have any overseas investments? - please <u>attach details</u>                  | Yes / No |
| 18. Did you reside overseas for any part of the tax year? please <u>attach details</u>    | Yes / No |
| 19. Do you have any non-business debt?<br><b>If so, please provide details here</b> _____ | Yes / No |
| 20. Do you, or have you ever had offshore superannuation policies?                        | Yes / No |
| 21. Have any of your details or circumstances changed since your last tax return?         | Yes / No |
| 22. Do you have any other matters you would like to discuss? - please attach details      | Yes / No |