

TaxAssist has created this checklist to ensure we take advantage of all the opportunities to maximise your tax refund or minimise your tax liability.

Please tick the income and work-related expenses that apply to you and we will discuss what is applicable during your free consultation with your TaxAssist Tax Agent.

Full Name:

Occupation:

Mobile Number:

Email Address:

SOURCES OF INCOME (Select ALL that you received during the financial year)		
Salaries and wages Centrelink payments Bank interest Company Dividends Crypto Shares Dividends	Business Income Partnership Income Foreign Investments Trust Distributions Shares Sold Managed Funds	Rental Income Employment share Schemes Foreign Employment Sold/Disposed Other

### EXPENSES

(ATO requires that you keep accurate records of your expenses, such as receipts and other written evidence of your expenses especially when exceeding \$300)

Accountant fees paid	\$	Uniforms and Protective Clothing	\$
Travel to Tax Agent	\$	Laundry	\$
Donations to charities	\$	Private Hospital Cover	\$
Police clearance or Medical Checks	\$	Car km (if under 5,000 km per year)	\$
Income protection Insurance	\$	Tools, equipment, stationery and books	\$
Memberships to professional bodies, associations, or political parties	\$	Personal Super Contribution	\$
Union Fees	\$	Mobile Bill % for work	\$

COMPLEX CLAIMS WITH SUPPORTING DOCUMENTS					
Working from home – keep a diary of days worked from home			Do you have a dedicated workspace?		
			Yes	No	
Computer equipment purchased	\$	Computer Consumables and Stationery	\$	Furniture purchased for home office	\$
Cleaning	\$	Rent	\$	Gas and Electricity	\$
Internet Bill	\$	Repairs to Office furniture and equipment	\$		

Private Motor Vehicle – over 5,000 km (Provide a logbook for 12 weeks period)					
Date of Purchase	\$	Cost of Purchase	\$	Make of Car and Model	\$
Registration Number		Repairs/Maintenance	\$	Tolls	\$
Lease documents	\$	Fuel	\$	Insurance	\$
Work-related Travel Expenses					
Parking	\$	Accommodation	\$	Food + drinks	\$
Tolls	\$	Car Hire	\$	Taxis, Uber	\$
Flights, trains and bus	\$				
Tools & Equipment used for work – Purchases over \$300					
	\$		\$		\$
Self-education expenses you paid for					
Conference Cost	\$	Travel	\$	Taxis	\$
CPD Courses	\$	Accommodation	\$	Car Hire	\$
Exam fee's	\$	Study from home	Hours	Tertiary Education Costs	\$
Investment Property					
Interest or Loans	\$	Repairs and Maintenance	\$	Assets less than \$300	\$
Council Rates	\$	Mortgages Fees	\$	Insurance	\$
Loans Fees	\$	Capital Work or Renovations	\$	Solicitor's Fee	\$
Broker Fees	\$	Stamp duty	\$	Gardening/Cleaning	\$
Water Rates	\$	Strata	\$	Other	\$