

**INDIVIDUAL TAX CHECKLIST (wage & salary earner)**

**Client Name:** .....

**Appointment date/time [Office only]:** .....

**Please complete before your appointment**

N/A      Encl

**Assessable Income:-**

- ATO Income Statements (including Centrelink, Employee Share Schemes, Pensions & Child Support)
- Eligible termination payments
- Interest received
- Dividends received
- Trust distributions from investments
- Any assets sold that may generate a capital gain
- Details of any overseas income

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**Allowable Employment Deductions - please bring proof of purchase:-**

- Motor vehicle travel (either km travelled or log book)
- Other related travel including train fares and toll charges
- Uniform (logo's) purchased and/or protective clothing
- Self education expenses relating to your employment
- Union fees
- Meals – if you receive a meal allowance (this may not be detailed on your PAYG Summary, so LBW requires further evidence)
- Subscriptions, conference and seminars
- Tools purchased for work usage
- Home office, mobile usage (please provide evidence)
- Other work related expenses such as sun protection
- Donations
- Income protection/sickness and accident insurance
- Tax Agent fees for prior year (including Audit Insurance costs)

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**Medicare Levy Related Items:-**

- Your 2022 Private Health Statement

|                          |                          |
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**Note:**

Medical offset has been completely phased out effective 30/06/2019.

**Other:**

- Have your BSB and Bank Account Number changed?  
.....
- Number of dependent children at 30 June 2022:  
.....
- Have you moved? Please provide your updated address details:  
.....
- Please provide your Email Address to update our system and to allow secure document signing:  
.....

**2022 Income Tax Return**