



GIACCA PARTNERS

BUSINESS ADVISORS • ACCOUNTANTS

A.B.N. 63 622 357 948

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2023 INDIVIDUAL INCOME TAX RETURN CHECKLIST

Full Name	
Tax File Number	
Date of Birth	
ABN (if applicable)	
Address	
Address (Postal) (Put 'as above' if the same)	
Telephone contacts	Mobile:
	Business Hours :
Email	
Electronic banking Details (for refund if applicable)	BSB:
	Account Number:
	Account Name:
Spouse Name and TFN	

Please circle YES or NO for each of the items listed and provide amounts applicable

INCOME – Please provide evidence

1. Salary or wages YES/NO
2. Allowances, earnings, tips, director's fees etc YES/NO
3. Employer lump sum payments YES/NO
4. Employment termination payments YES/NO
5. Australian Government allowances & payments like Newstart, youth allowance & Austudy payments..... YES/NO
6. Australian Government pensions and allowances YES/NO
7. Australian annuities and superannuation income streams YES/NO
8. Australian superannuation lump sum payments YES/NO
9. Attributed personal services income YES/NO
10. Gross Interest YES/NO
11. Dividends YES/NO
12. Employee share schemes YES/NO
13. Distributions from partnerships and/or trusts YES/NO
14. Personal services income (PSI) YES/NO
15. Net income or loss from business (as a sole trader) YES/NO
16. Deferred non-commercial business losses YES/NO
17. Net farm management deposits or repayments YES/NO
18. Capital gains YES/NO
19. Foreign entities:
 - Direct or indirect interests in controlled foreign company YES/NO
 - Transfer of property or services to a non-resident trust..... YES/NO

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Tax agent
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- 20. Foreign source income (including foreign pensions) and foreign assets or propertyYES/NO
- 21. RentYES/NO
- 22. Bonuses from life insurance companies or friendly societiesYES/NO
- 23. Forestry managed investment scheme incomeYES/NO
- 24. Other income (please specify below).....YES/NO

DEDUCTIONS – Please provide evidence

D1. Work related car expenses

- cents per kilometre method (up to a maximum of 5,000 kms).....YES/NO
- log book method.....YES/NO

D2. Work related travel expenses

- Employee domestic travel with reasonable allowanceYES/NO
- If the claim is more than the reasonable allowance rate, do you have receipts for your expenses?YES/NO
- Overseas travel with reasonable allowanceYES/NO
- Do you have receipts for accommodation expenses?YES/NO
- If travel is for 6 or more nights in a row, do you have travel records? (e.g. a travel diary)YES/NO
- Employee without a reasonable travel allowanceYES/NO
- Did you incur and have receipts for airfares?YES/NO
- Did you incur and have receipts for accommodation?YES/NO
- Do you have receipts for hire cars (if applicable)?YES/NO
- Did you incur and have receipts for meals and incidental expenses?YES/NO
- Do you have any other travel expenses?YES/NO
- Other work-related travel expenses (e.g. a borrowed car).....YES/NO
- (please specify)
-

D3. Work related uniform and other clothing expenses

- Protective clothingYES/NO
- Occupation specific clothingYES/NO
- Non-compulsory uniformYES/NO
- Compulsory uniformYES/NO
- Conventional clothingYES/NO
- Laundry expenses (up to \$150 without receipts)YES/NO
- Dry cleaning expensesYES/NO
- Other claims such as mending/repairs, etc (please specify)YES/NO
-

D4. Work related self-education expenses

Course taken at educational institution:

- union feesYES/NO
- course feesYES/NO
- books, stationeryYES/NO
- depreciationYES/NO
- travel.....YES/NO
- other (please specify).....YES/NO

D5. Other work related expenses

- Home office expensesYES/NO
- Computer and softwareYES/NO
- Telephone/mobile phoneYES/NO
- Tools and equipmentYES/NO

Other work related expenses - continued

Subscriptions and union feesYES/NO
Journals/periodicalsYES/NO
DepreciationYES/NO
Sun protection products (i.e., sunscreen and sunglasses) YES/NO
Seminars and courses not at an educational institution:
- course feesYES/NO
- travelYES/NO
- other (please specify)YES/NO
Any other work related deductions (please specify)YES/NO
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Other types of deductions

D6. Low value pool deduction.....YES/NO
D7. Interest deductionsYES/NO
D8. Dividend deductionsYES/NO
D9. Gifts or donationsYES/NO
D10. Cost of managing tax affairsYES/NO
D11. Deductible amount of un-deducted purchase price of a foreign pension or annuityYES/NO
D12. Personal superannuation contributionsYES/NO
Full name of fund: Account no:
Fund ABN: Fund TFN:.....
Have you provided the fund a notice of intention to deduct the contribution?.....YES/NO
Has this notice been acknowledged by the fund?.....YES/NO
D13. Deduction for project poolYES/NO
D14. Forestry managed investment scheme deductionYES/NO
D15. Other deductions (please specify)YES/NO
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L1. Tax losses of earlier income yearsYES/NO

Tax offsets/rebates – Please provide evidence

T1. Are you a senior Australian or a pensioner?YES/NO
T2. Did you receive an Australian superannuation income stream?YES/NO
T3. Did you make superannuation contributions on behalf of your spouse?YES/NO
T4. Did you live in a remote area of Australia or serve overseas with the Australian Defence Force or the UN armed forces in 2023?.....YES/NO
T5. Did you have an ongoing net medical expenses in 2023 relating to disability aids, attendant care or aged care Expenses?.....YES/NO
T6. Did you maintain a dependant who is unable to work due to invalidity or carer obligations?..... YES/NO
T7. Are you entitled to claim the landcare and water facility tax offset?YES/NO
T8. Other non-refundable tax offsets (please specify)YES/NO
T9. Other refundable tax offsets (please specify)YES/NO
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Other Relevant Information

A. Are you entitled to the Medicare levy exemption or reduction in 2023?YES/NO
(If yes, please specify):.....
B. Did you have private health insurance in 2023?YES/NO
(If yes, please provide the annual statement received from your health fund)
C. Were you under the age of 18 on 30 June 2023?YES/NO
D. Did you become an Australian tax resident at any time during the 2023 income year?YES/NO

Other Relevant Information - *continued*

- E. Did you cease to be an Australian tax resident at any time during the 2023 income year? YES/NO
- F. Did you make a non-deductible (non-concessional) personal super contribution? YES/NO
- G. Do you have a HECS/HELP liability or a student financial supplement loan debt? YES/NO
- I. Did a trust or company distribute income to you in respect of which Family Trust Distribution Tax (FTDT) was paid by the trust or company? YES/NO
- J. Do you have a loan with a private company or have such a loan amount forgiven? YES/NO
(If yes, please specify) – (reviewer consider if deemed dividend in year under Division 7A):
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K. Did you receive any benefit from an employee share acquisition scheme? YES/NO

L. Family Tax Benefit ('FTB'):

- Did you have care of a dependent child in 2023? YES/NO
- Did you or your spouse receive FTB through the Department of Human Services in 2023? YES/NO

M. Income tests information

- Do you have any total reportable fringe benefits amounts in 2023? YES/NO
- Do you have any reportable employer superannuation contributions in 2023? YES/NO
- Did you receive any tax-free government pensions in 2023? YES/NO
- Did you receive any target foreign income in 2023? YES/NO
- Did you have a net financial investment loss in 2023? YES/NO
- Did you have a net rental property loss in 2023? YES/NO
- Did you pay child support in 2023? YES/NO
- Number of dependent children? _____

N. Spouse details *(if applicable)*

– Did you have a spouse for the full year from 1 July 2022 to 30 June 2023 YES/NO

If you had a spouse for only part of the income year, please specify the dates between 1 July 2022 to 30 June 2023 when you had a spouse: From ____ / ____ / _____ to ____ / ____ / _____

- What was your spouse's taxable income for the 2023 income year? \$.....
- Does your spouse have a share of trust income on which the trustee is assessed under Section 98 that has not been included in your spouse's taxable income YES/NO
- Did a trust or company distribute income to your spouse in respect of which family trust distribution tax was paid by the trust or company for the 2023 income year? YES/NO
- Did your spouse have any reportable fringe benefits amounts for the 2023 income year YES/NO
- Did your spouse receive any Australian Government pensions or allowances (not including exempt pension income) in the 2023 income year? YES/NO
- Did your spouse receive any exempt pension income in the 2023 income year? YES/NO
- Does your spouse have any reportable super contributions for the 2023 income year? YES/NO
- Did your spouse receive any tax-free government pensions paid under the *Military Rehabilitation and Compensation Act 2004*? YES/NO
- Did your spouse receive any 'target foreign income' in the 2023 income year? YES/NO
- Did your spouse have a total net investment loss (i.e., the total of any financial investment loss and a rental property loss) for the 2023 income year? YES/NO
- Did your spouse pay child support during the 2023 income year? YES/NO
- If your spouse is 55 to 59 years old, did they receive a superannuation lump sum (other than a death benefit) during the 2023 income year that included a taxed element that does not exceed their low rate cap? YES/NO

.....
Signature of Taxpayer

.....
Name (print)

Dated.....