

Individual Checklist

Year Ended 30 June 2022

Client Details

Name:

TFN:

Occupation:

Address:

Phone Number:

Email:

Dependent Details

Number of Dependents:

Full Name:

DOB:

Full Name:

DOB:

Full Name:

DOB:

Bank Details

Bank:

Account Name:

BSB:

Account Number:

Individual Checklist

Year Ended 30 June 2022

Income

Provided

PAYG Payment Summary Statements
or STP Details uploaded to ATO

☐

Interest Received

☐

Dividends Received

☐

Employee Share Schemes

☐

Trust Distributions Received

☐

Rental Property Income & Expenses

☐

Superannuation Lump Sum Payments or Annuities

☐

Foreign Income Received

☐

Sale of Assets - e.g: shares, property, trust units

☐

Other Income Received

☐

Notes:

Individual Checklist

Year Ended 30 June 2022

Deductions

Provided

Car Expenses (Log Book Required)

☐

Travel Expenses

☐

Uniform, Laundry and PPE Expenses

☐

Self-Education Expenses

☐

Income Protection Insurance

☐

Sickness & Accident Insurance

☐

Donations

☐

Personal Super Contributions (Intent to Claim a
Deduction acknowledgement is required)

☐

Home Office Expenses

☐

Number of Hours Worked at Home During the Pandemic?

Private % Use of:

Phones:

Computers:

iPads:

Notes:

Individual Checklist

Year Ended 30 June 2022

Tax Offsets

Provided

Private Health Insurance Policy Statement

Superannuation Contributions for Your Spouse

Other Offsets

☐
☐
☐

Notes:

The above information I have provided is a true and correct record of my personal expenses and financial obligations

Signature of Taxpayer:

Date: