

Individual Checklist

Year Ended 30 June 2021

Client Details

Name: DOB:

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 2021

Income

PAYG Payment Summary Statements
or STP Details uploaded to ATO

Interest Received

Dividends Received

Business Income

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

Provided

Notes:

Individual Checklist

Year Ended 30 June 2021

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:

Overtime Meals (payment received,
number of meals, cost of meals)

Notes:

Individual Checklist Year Ended 30 June 2021

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: