

## Individual Checklist Year Ended 30 June 2023

### Client Details

Name:

TFN:

Occupation:

Address:

Phone Number:

Email:

DOB:

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### Dependent Details

Number of Dependents:

Full Name:

DOB:

Full Name:

DOB:

Full Name:

DOB:

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### Bank Details

Bank:

Account Name:

BSB:

Account Number:

## Individual Checklist Year Ended 30 June 2023

### 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 2023

### 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 2023

### 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:**