

# Income Tax Return Checklist - 2018

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## Deductions:

The following expense categories are listed to assist in preparation of your Income Tax Return. If you have paid any of these expenses via salary sacrifice or have been reimbursed by your employer do not include these.

### Accounting /Tax Agent Fees

Taxation: \$

Agents Name if not BCFR:

### Bank Charges/ Interest

Bank charges and interest are deductible on bank accounts used only for investment purposes.

Account Fees: \$

Interest: \$

### Computer / Internet Access Expenses

Internet monthly Fees

\$

Work Usage: %

Computer expenses

\$

Description:

Description:

### Donations:

Amount:

\$

Charity:

Amount:

\$

Charity:

### Home Office

Do you have a separate home office ?

Y / N

How many hours worked per week:

Hours

### Income Protection:

Company:

Policy Number :

Premium Paid: \$

Please provide policy documents

### Telephone - Mobile

Cost: \$ Business Use: %

### Telephone - Home office (Work Calls Only)

Cost: \$ Business Use: %

### Subscriptions / Memberships (employment/ business related)

Cost: \$ Description:

Cost: \$ Description:

### Seminars & Conferences

Cost: Description: Date:

### Study & Exam Expenses (connection to current employment)

Cost: \$ Description:

Cost: \$ Description:

### Other Work Related Expenses (e.g. Tools of trade, protective clothing, Union Fees, briefcase, stationery etc.)

Cost: \$ Description:

Cost: \$ Description:

Cost: \$ Description:

Cost: \$ Description:

### Motor Vehicle Travel (e.g. travel between places of employment)

#### Method 1: Log Book Method:

A log book for a 12 week period will need to be kept to calculate the work related percentage deductible.

A summary of all motor vehicle expenses for the year:

**Motor Vehicle Price: \$**                      **Date Purchased:**                      **Make & Model:**

Fuel: \$    Registration: \$    Insurance: \$

Maintenance Costs: \$    Interest on finance arrangements: \$

#### Method 2: Cents per Kilometre Method (maximum claim 5,000 km)

Kilometres Travelled:                      KM's

A brief descriptions to determine how the KM's was calculated is required.

Description:

## Superannuation Deductions

Additional concessional contributions to your superannuation fund are deductible with a notice of intent to claim a personal tax deduction form.

Additional Contributions: \$ \_\_\_\_\_ Please provide notice of intent to claim a tax deduction.

*Please note all the above deductions must have been incurred by the tax payer and proof of purchase is required (receipts or bank statements) that can be substantiated for a minimum of 5 years from the date of lodgement.*