

Individual Tax Return Checklist – New Clients



Name:

Bank details: BSB: Account number:

Account name:

Occupation:

Please answer ALL questions completely

If the "yes" box is not checked, we will assume you are answering no.

	Yes	No
Do you have any shares or trust accounts?	<input type="radio"/>	<input type="radio"/>
If yes, please list names of all accounts here so we can check against ATO data		
<input type="text"/>		
Do you have a rental property?	<input type="radio"/>	<input type="radio"/>
If yes, please complete the rental checklist available at https://www.mortdaletax.com.au/rental-checklist.pdf		
Do you use your personal vehicle for work?	<input type="radio"/>	<input type="radio"/>
Do you wear a uniform or buy clothes for work?	<input type="radio"/>	<input type="radio"/>
NB: Please only mark yes for this question if it is protective clothing, compulsory uniform with work logo, occupation specific, or registered with Aus Industry. Conventional clothing such as black pants, suit, runners, jeans etc are NOT DEDUCTIBLE.		
If yes, how many full loads of deductible clothing did you wash in the financial year? <input type="text"/>		
(Halve the number for half loads)		
Did you work from home and keep a record of the hours for the whole year?	<input type="radio"/>	<input type="radio"/>
If yes, please attach these records		
Did you use your personal mobile or internet for work?	<input type="radio"/>	<input type="radio"/>
If yes, please attach records showing breakdown of work and personal use. Alternative records are possible for small claims (up to \$50)		
Did you make any donations to registered charities? Receipt must say 'deductible'	<input type="radio"/>	<input type="radio"/>
Did you use a tax agent to prepare your tax return last year?	<input type="radio"/>	<input type="radio"/>
If yes, please enter cost: <input type="text"/>		
Please attach last year's return		
Did you make an extra superannuation contributions DIRECTLY to your fund?	<input type="radio"/>	<input type="radio"/>
Do not include salary sacrificed amounts or other amounts paid by your employer		
Are there any other items for which you wish to claim a tax deduction?	<input type="radio"/>	<input type="radio"/>
If yes, please list items with cost here (attach separate document if inadequate space):		
<input type="text"/>		
Do you have any dependent children?	<input type="radio"/>	<input type="radio"/>
If yes, please enter their ages: <input type="text"/>		
Did you have private hospital cover for the full year?	<input type="radio"/>	<input type="radio"/>
If part year, please advise number of days policy held: <input type="text"/>		
Did you run a business? Eg Uber, eBay, Gumtree, Air BnB etc	<input type="radio"/>	<input type="radio"/>
Did you have any asset sales during the financial year? Eg house, shares, crypto currency	<input type="radio"/>	<input type="radio"/>
Are you living with a partner?	<input type="radio"/>	<input type="radio"/>
If yes, and they are NOT a client of MTA, what was their taxable income for the financial year? <input type="text"/>		

PLEASE NOTE: You need to keep receipts, logbooks and other supporting evidence in your files for at least 5 years after the return is lodged.

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