

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?

If yes, please list names of all accounts here so we can check against ATO data

Do you have a rental property?

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?

Do you wear a uniform or buy clothes for work?

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?

(Halve the number for half loads)

Did you work from home and keep a record of the hours for the whole year?

If yes, please attach these records

Did you use your personal mobile or internet for work?

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'

Did you use a tax agent to prepare your tax return last year?

If yes, please enter cost:

Please attach last year's return

Did you make an extra superannuation contributions DIRECTLY to your fund?

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?

If yes, please list items with cost here (attach separate document if inadequate space):

Do you have any dependent children?

If yes, please enter their ages:

Did you have private hospital cover for the full year?

If part year, please advise number of days policy held:

Did you run a business? Eg Uber, eBay, Gumtree, Air BnB etc

Did you have any asset sales during the financial year? Eg house, shares, crypto currency

Are you living with a partner?

If yes, and they are NOT a client of MTA, what was their taxable income for the financial year?

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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