

# 2024 Individual Tax Checklist



Client Information					
Client Name					
Client Address					
Telephone number					
Email					
Occupation					
Bank Details					
Bank Account Name					
BSB Number					
Account Number					
Income Details					
Salary and Wage		Yes		No	
Interest Received		Yes		No	
Dividends Received		Yes		No	
Rental Income & Expenses		Yes		No	
Sale of Investments (Purchase and Sale Documents)		Yes		No	
Other (Managed Funds, Foreign, Crypto)		Yes		No	
Deductions					
Work Related Car Expenses (total kilometres travelled or documented logbook with total expenses)		Yes		No	
Work Related Travel Expenses		Yes		No	
Work Related Clothing Expenses		Yes		No	
Work Related Self Education (University or TAFE courses - directly relating to employment)		Yes		No	
Seminars/Work Related Training Courses		Yes		No	
Telephone/Mobile/Internet - Estimated Work %		Yes		No	
Computers and Software		Yes		No	
Tools and Equipment		Yes		No	
Sun Protection (if employment duties are outside)		Yes		No	
Gifts/Donations to Charitable Organisations		Yes		No	
Working From Home (Please note a documented diary is required - please contact to discuss)		Yes		No	
Personal Superannuation Contributions (Completed Notice of Intent to Claim)		Yes		No	
Income Protection Insurance		Yes		No	
Other Deductions		Yes		No	
Miscellaneous					
Employee Share Acquisition Scheme		Yes		No	
Dated the ..... day of ..... 20.....					
Signature of taxpayer ..... Name .....					
<b>"Please attach relevant information where you have marked YES"</b>					
Any comments you think we should be aware of :					
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.....					
.....					