

2022 Tax Checklist

*Here’s a helpful checklist to collect everything you need to prepare your income tax return. Please collect your receipts, tax invoices and documents for the items below that are applicable to you.*

**WORK RELATED:**

*(costs incurred between 1 July 2021 and 30 June 2022)*

* Laundry – do you wear a compulsory uniform with a logo? YES / NO
* Receipts for any uniforms and protective gear purchased.

* Work related travel expenses (eg. seminars, training, conferences, visiting clients, etc - flights, accommodation, meals, and other travel costs).
* Work related expenses (eg. tools, stationery, union fees, memberships, subscriptions, registrations, etc).
* Please provide details of the following if these are applicable to your work:
  + Mobile Phone $\_\_\_\_\_\_ per month at \_\_\_\_\_\_% work related
  + Home Internet $\_\_\_\_\_\_ per month at \_\_\_\_\_\_% work related
  + Home Office \_\_\_\_\_\_\_ hours per week
* Self-education expenses (eg. textbooks, computer expenses, internet, stationery, and travel).
* Receipts for any donations made.

**MOTOR VEHICLE:**

*(please only complete* ***one*** *of the methods below – if they apply to you)*

**Method 1: Motor vehicle work related travel – Cents per KM method**

* + Work related kilometres travelled: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
  + Make and model of vehicle: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
  + Rego number of the vehicle: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
  + Odometer reading at 30 June 2022: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
  + Description for the **purpose** of the travel: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Method 2: Motor vehicle work related travel – Logbook method**

* + Please provide the logbook kept for 12 consecutive weeks.
  + Please provide a summary of the total fuel, rego, insurance, and repairs costs incurred during the period 1 July 2021 to 30 June 2022:
    - Fuel: $\_\_\_\_\_\_\_\_\_\_\_\_\_
    - Rego: $\_\_\_\_\_\_\_\_\_\_\_\_\_
    - Insurance: $\_\_\_\_\_\_\_\_\_\_\_\_\_
    - Repairs: $\_\_\_\_\_\_\_\_\_\_\_\_\_ *\*\* please also include receipts*
  + To claim depreciation on the vehicle, please advise the date the vehicle was purchased and the purchase price (please also provide the original purchase invoice if you have this).
  + If the vehicle is under finance, please provide the finance documents showing the amount financed, term of the loan, repayments, interest components, etc.
  + Make and model of vehicle: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
  + Rego number of the vehicle: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
  + Odometer reading at 30 June 2022: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
  + Description for the **purpose** of the travel: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**SMALL BUSINESS INCOME:**

* Please provide a spreadsheet showing a detailed list of the total income received (including and excluding GST, if applicable) for the period 1 July 2021 to 30 June 2022 if you were working under an ABN.
* Please provide a spreadsheet showing a detailed list of business expenses incurred (including and excluding GST), that is summarised and totalled into categories. Please also provide receipts for any purchases over $1,000.

**OTHER:**

* The ATO no longer issues tax refunds by cheques. Please ensure that you provide your bank details below that you would like any potential tax refunds deposited into.
  + Account Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
  + BSB: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
  + Account Number: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Annual Tax Statement outlining the total amount of income protection premiums paid during the 2021/2022 financial year from your insurance provider.
* Please advise the total amount of child support paid for the 2021/2022 financial year (if applicable): $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

* If you made any personal superannuation contributions into your super fund, would you kindly provide the letter from your super fund outlining the total amount of super contributions you wish to claim as a tax deduction.

**SHARES, CRYPTOCURRENCY & MANAGED FUNDS INVESTMENTS:**

* Please provide us with copies of the dividend slips for any dividends received during the period 1 July 2021 to 30 June 2022.
* Investment expenses incurred (eg. bank fees, financial advisor fees, subscriptions, resources, interest on loans).
* Please provide investment loan statements for the period 1 July 2021 to 30 June 2022 (if applicable).
* Details of any shares/cryptocurrency/investments purchased during the period 1 July 2021 to 30 June 2022. Please provide the purchase documents outlining the number of shares/coins/units purchased, purchase date and the amount paid.

* Details of any shares/cryptocurrency/investments sold during the period 1 July 2021 to 30 June 2022. Please provide the purchase and sale documents outlining the number of shares/coins/units purchased/sold, purchase/sale date and the amount paid/received.
* Annual Taxation Statement for the year ending 30 June 2022 for any managed fund investments.
* If you invested in cryptocurrency during the year, please provide us with a copy of the detailed transaction report from your trading platform showing all coin buys and sales during the period 1 July 2021 to 30 June 2022.

**RENTAL PROPERTIES:**

* See the schedule below for information that is required to complete the rental property schedule in your tax return. Please provide details/receipts for each of the expenses listed that are applicable to your property.
* If the rental properties are managed by a real estate, please provide the Property Agent Statement for the year ending 30 June 2022.
* If the property is managed privately, please provide details of the total rent received during the period 1 July 2021 to 30 June 2022.
* Please provide copies of the loan statements for each of the properties for the period 1 July 2021 to 30 June 2022.
* If you have sold any rental properties, it is necessary to provide us with all of the items outlined below:
  + Purchase contract and settlement statement
  + Legal fees paid on purchase
  + Stamp duty paid on purchase
  + Sale contract and settlement statement
  + Legal fees paid on sale
  + Commissions paid on sale
  + Any advertising costs
  + Any other costs you have incurred in purchasing and selling the property

|  |  |
| --- | --- |
| **EXPENSES** | |
| Advertising for tenants | $ |
| Body corporate fees | $ |
| Cleaning | $ |
| Council rates & Water rates | $ |
| Gardening/ Lawn mowing | $ |
| Insurance | $ |
| Interest on loans | $ |
| Legal fees | $ |
| Letting fees | $ |
| Pest control | $ |
| Property agent fees/commission | $ |
| Repairs and maintenance | $ |
| Stationery, printing, and postage | $ |

**NOTES:**

|  |
| --- |
|  |
|  |
|  |
|  |
|  |
|  |
|  |
|  |
|  |
|  |
|  |
|  |
|  |
|  |
|  |
|  |
|  |
|  |
|  |
|  |
|  |
|  |
|  |
|  |

*If you are unsure about any of the items, please do not hesitate to contact our office and one of our accountants will be able to assist you.*