

# Visions Synergy Associates

(Certified Practising Accountant & Registered Tax Agent)

## 2008 Individual Income Tax Return Checklist

Tax File Number: ..... / ..... / ..... ABN: .....

Are you an Australian resident?

YES/NO/UNSURE.....

Name:

Mr/Mrs/Ms/Miss: .....

Name changed since last return? YES/NO

If YES, previous name: .....

Postal Address: .....

Postal address changed from last tax return? YES/NO

Address: .....

Date of birth: ..... / ..... / .....

Telephone: (H) ..... (W) ..... (M) .....

Email: .....

Occupation: .....

Spouse details (if applicable): .....

Do you want to use Electronic Funds Transfer? YES/NO

If YES, provide bank details BSB: ..... Account Number: .....

Account name: .....

**Visions Synergy Associates ABN 24 081 189 424**

Suite 23, Level 2, International House, 104 Bathurst Street, Sydney, NSW 2000

Mailing address: P.O. Box 179, Darlinghurst, NSW 2010

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Please circle **YES** or **NO** for each of the items listed below:

## INCOME – Please provide evidence

- 1. Salary or wages ..... YES/NO
- 2. Allowances, earnings, tips, director’s fees etc ..... YES/NO
- 3. Employer lump sum payments ..... YES/NO
- 4. Employment termination payments ..... YES/NO
- 5. Australian Government allowances and payments like newstart, youth allowance and Austudy payment ..... YES/NO
- 6. Australian Government pensions and allowances ..... YES/NO
- 7. Australian annuities and superannuation income streams ..... YES/NO
- 8. Australian superannuation lump sum payments ..... YES/NO
- 9. Attributed personal services income ..... YES/NO
- 10. Reportable fringe benefits amounts ..... YES/NO
- 11. Interest ..... YES/NO
- 12. Dividends ..... YES/NO
- 13. Distributions from partnerships and/or trusts ..... YES/NO
- 14. Personal services income (PSI) ..... YES/NO
- 15. Net income or loss from business ..... YES/NO
- 16. Deferred non-commercial business losses ..... YES/NO
- 17. Net farm management deposits or withdrawals ..... YES/NO
- 18. Net capital gains ..... YES/NO
- 19. Direct or indirect interests in controlled foreign entities ..... YES/NO
- 19. Transfer of property or services to a foreign resident trust ..... YES/NO
- 19. Interests in a foreign investment fund (FIF) or a foreign life assurance policy (FLP) ..... YES/NO
- 20. Foreign source income (including foreign pensions) and foreign assets or property ..... YES/NO
- 21. Rent ..... YES/NO
- 22. Bonuses from a life insurance company or friendly society policy ..... YES/NO
- 23. Forestry managed investment scheme income ..... YES/NO
- 24. Other income (please specify) ..... YES/NO
- .....
- .....

## DEDUCTIONS – Please provide evidence

### D1. Work related car expenses

- cents per kilometre method (up to a maximum of 5,000 kms) ..... YES/NO
- log book method ..... YES/NO
- one-third of actual expenses method ..... YES/NO

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– 12% of actual cost method ..... YES/NO

## D2. Work related travel expenses

Employee domestic travel with reasonable allowance ..... YES/NO

– If the claim is more than the reasonable allowance rate, do you have receipts for your expenses?..... YES/NO

Overseas travel with reasonable allowance ..... YES/NO

– Do you have receipts for accommodation expenses? ..... YES/NO

– If travel is for 6 or more nights in a row, do you have travel records? (e.g. a travel diary)YES/NO

Employee without a reasonable travel allowance ..... YES/NO

– Did you incur and have receipts for airfares?..... YES/NO

– Did you incur and have receipts for accommodation? ..... YES/NO

– Do you have receipts for hire cars (if applicable)? ..... YES/NO

– Did you incur and have receipts for meals and incidental expenses? ..... YES/NO

– Do you have any other travel expenses? ..... YES/NO

Other work-related travel expenses (e.g., a borrowed car) ..... YES/NO  
(please specify)

.....  
.....

## D3. Work related uniform and other clothing expenses

Protective clothing ..... YES/NO

Occupation specific clothing ..... YES/NO

Non-compulsory uniform ..... YES/NO

Compulsory uniform ..... YES/NO

Conventional clothing ..... YES/NO

Laundry expenses (up to \$150 without receipts) ..... YES/NO

Dry cleaning expenses ..... YES/NO

Other claims such as mending/repairs, etc (please specify) ..... YES/NO

.....  
.....

## D4. Work related self-education expenses

Course taken at educational institution:

– union fees ..... YES/NO

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- course fees ..... YES/NO
- books, stationery ..... YES/NO
- depreciation ..... YES/NO
- seminars ..... YES/NO
- travel ..... YES/NO
- other (please specify) ..... YES/NO
- .....
- .....

**D5. Other work related expenses**

- Home office expenses ..... YES/NO
- Computer and software ..... YES/NO
- Telephone/mobile phone ..... YES/NO
- Tools and equipment ..... YES/NO
- Subscriptions and union fees ..... YES/NO
- Journals/periodicals ..... YES/NO
- Depreciation ..... YES/NO
- Sun protection products (i.e., sunscreen and sunglasses) ..... YES/NO
- Seminars and courses not at an educational institution:
  - course fees ..... YES/NO
  - travel ..... YES/NO
  - other (please specify) ..... YES/NO
- Any other work related deductions (please specify) ..... YES/NO
- .....

**Other types of deductions**

- D6. Low value pool deduction ..... YES/NO
- D7. Interest and dividend deductions ..... YES/NO
- D8. Gifts or donations ..... YES/NO
- D9. Cost of managing tax affairs ..... YES/NO
- D10. Australian film industry incentives ..... YES/NO
- D11. Deductible amount of undeducted purchase price of a foreign pension or annuity .... YES/NO

**Other types of deductions (continued)**

- D12. Personal superannuation contributions ..... YES/NO

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Full name of fund: ..... Account no: .....  
Fund ABN: ..... Fund TFN: .....

- D13. Deduction for project pool ..... YES/NO  
D14. Forestry managed investment scheme deduction ..... YES/NO  
D15. Other deductions (please specify) ..... YES/NO  
.....  
L1. Tax losses of earlier income years ..... YES/NO

## Tax offsets/rebates

- T1. Do you have a dependent spouse (without dependent child or student), a housekeeper or a child-housekeeper? ..... YES/NO<sup>o</sup>  
T2. Are you a senior Australian? ..... YES/NO  
T3. Are you a pensioner? ..... YES/NO  
T4. Did you receive a superannuation income stream? ..... YES/NO  
T5. Did you have private health insurance in 2008? ..... YES/NO  
T6. Do you have a child that was born or adopted between 1 July 2001 and 30 June 2004? YES/NO  
T7. Did you make superannuation contributions on behalf of your spouse? ..... YES/NO  
T8. Did you live in a remote area of Australia or serve overseas with the Australian defence force or the UN armed forces in 2008? ..... YES/NO  
T9. Did you have net medical expenses over \$1,500? ..... YES/NO  
T10. Did you maintain a parent, spouse's parent or invalid relative? ..... YES/NO  
T11. Are you entitled to claim the landcare and water facility tax offset? ..... YES/NO  
T12. Are you a mature age worker with 'net income from working' of less than \$63,000? YES/NO  
T13. Are you a 'small business entity' with an annual turnover of \$75,000 or less? ..... YES/NO  
T14. Other tax offsets (please specify) ..... YES/NO  
.....

<sup>o</sup> These tax offsets may not be available where the taxpayer is eligible to claim FTB Part B.

## Other relevant information

- A. Are you entitled to the Medicare levy exemption or reduction in 2008? ..... YES/NO  
(If yes, please specify):

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- .....
- .....
- B. Did you become an Australian tax resident at any time during the 2008 income year?.. YES/NO
- C. Did you cease to be an Australian tax resident at any time during the 2008 income year? .....
- ..... YES/NO
- D. Do you have a HECS/HELP liability or a student supplement loan debt?..... YES/NO
- E. Did you pay any tax within 14 days before the due date of the liability (e.g., HECS/HELP)? .....
- ..... YES/NO
- F. Did a trust or company distribute income to you in respect of which family trust distribution tax was paid by the trust or company?..... YES/NO
- G. Do you have a loan with a private company or have such a loan amount forgiven?..... YES/NO  
(If yes, please specify) – (reviewer consider if deemed dividend in year):
- .....
- .....

- H. Did you receive any benefit from an employee share acquisition scheme? ..... YES/NO  
(If yes, please specify) – (reviewer consider if assessable in year):
- .....
- .....

I. Family Tax Benefit ('FTB'):

- Did you have care of a dependent child in 2008?..... YES/NO
- Did you or your spouse receive FTB through the Family Assistance Office in 2008? . YES/NO

Dated the ..... day of .....20.....

.....  
*Signature of taxpayer*

.....  
*Name (print)*

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